SiteManager Training Manual

Module E
Chapter 1

Change Orders
Change Order Maintenance (+)

Creating a Change Order

Student's Version

Indiana Department of Transportation
February 2009, Version 3.9a

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Change Orders Overview

This section summarizes the topics necessary to create, review, deleting a new project line item, approve, reject and track a change order.

CREATING CHANGE ORDERS

There are four types of change orders that will be utilized by INDOT. The modules for creating these change orders are listed below.

Overrun/Underrun Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Overrun and Underrun Change Order Items
- Change Order Explanations

Extra Work Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Extra Work Item
- Change Order Explanations
- Force Account

Time Adjustments Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Time Adjustments
- Change Order Explanations

Zero Dollar Change Order

- Creating a Change Order Header
- Attaching Documents to a Contract (optional)
- Viewing an Attachment (optional)
- Change Order Explanations

Final Quantity Change Order

- Not to be utilized by INDOT

NOTE: Overrun/Underrun, Extra Work, and Time Adjustments Change Orders can all occur on one change order as long as they all have the same Reason Code. No items or time adjustments can be created on a Zero Dollar Change Order.

CHANGE ORDER APPROVAL PROCESS

The sections for approving a change order are listed below.

Forwarding a Change Order for Review - Optional
Reviewing a Change Order - Optional
Viewing an Attachment
Printing the Change Order Document
Placing a Change Order in Pending Status
Approving or Denying a Change Order
When a Change Order is Denied
Tracking a Change Order
Error Messages

MISCELLANEOUS

After the change order is approved, it is complete.

Items may now be posted using a **Daily Work Report (DWR)**.

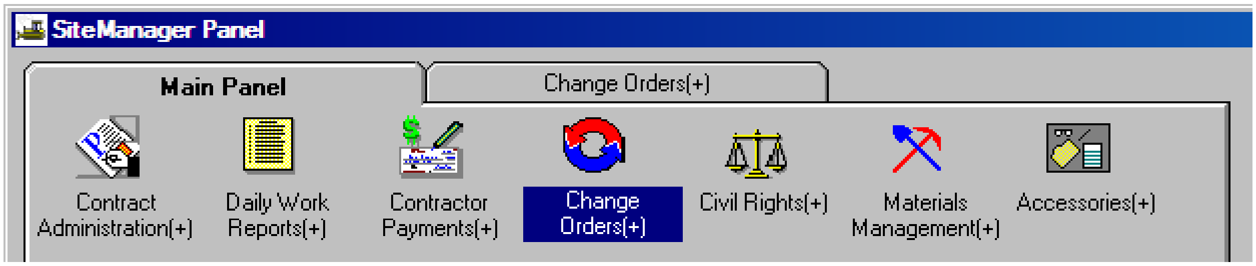
A change order may be deleted if it is in draft status and if all change order items, time extensions and explanations have been deleted from the change order.

NOTE: The Change Order Report printing process will not work in the Training Database. The user must log into SiteManager via CITRIX and print out a Change Order from an existing Contract.

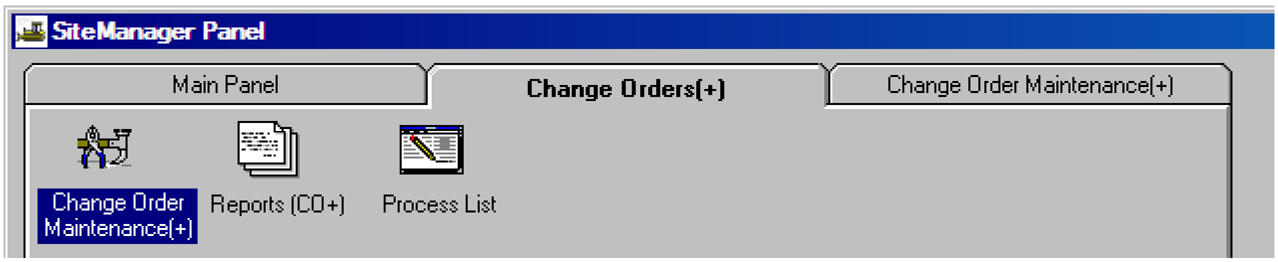
NOTE: For this training document log into SiteManager as:
PE/S: d90bclip Area Engineer: d90ffarm Contractor: txxphann
Passwords are all: pass

Creating a Overrun/Underrun Change Order
Adding items on an Extra Work Change Order.

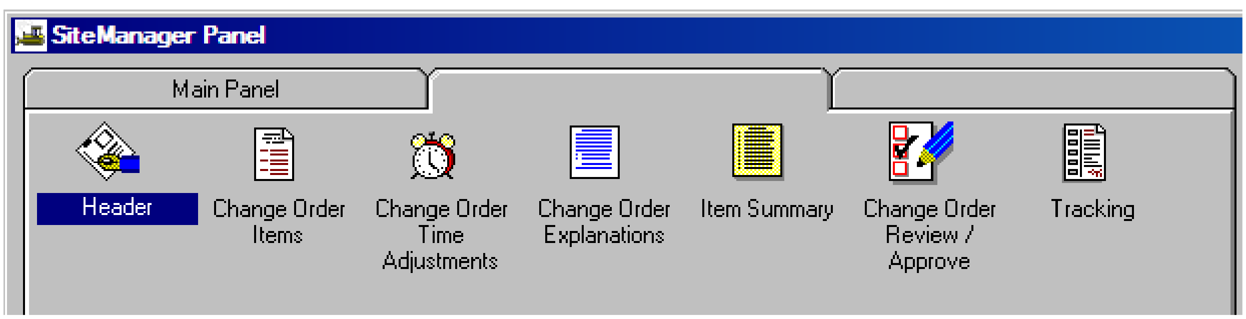
This is the first step in creating a Overrun/Underrun change order is to create a header.



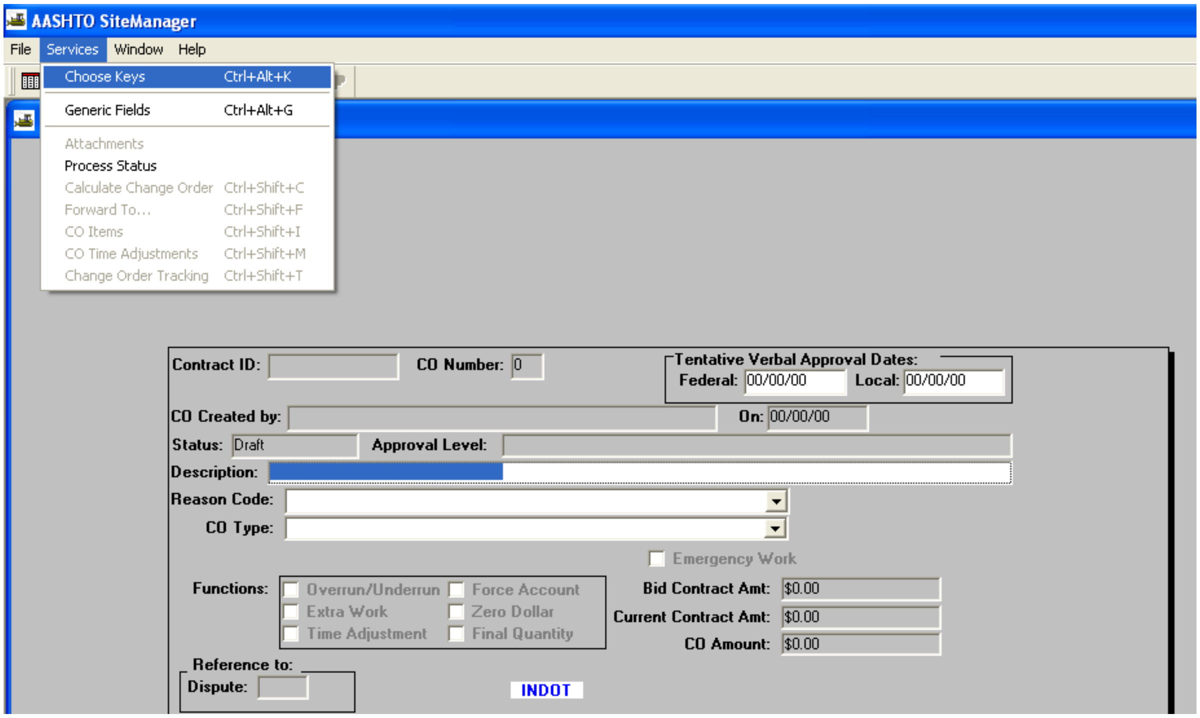
From the Main Panel, “double-click” **Change Orders (+)**.



“Double-click” **Change Order Maintenance (+)**

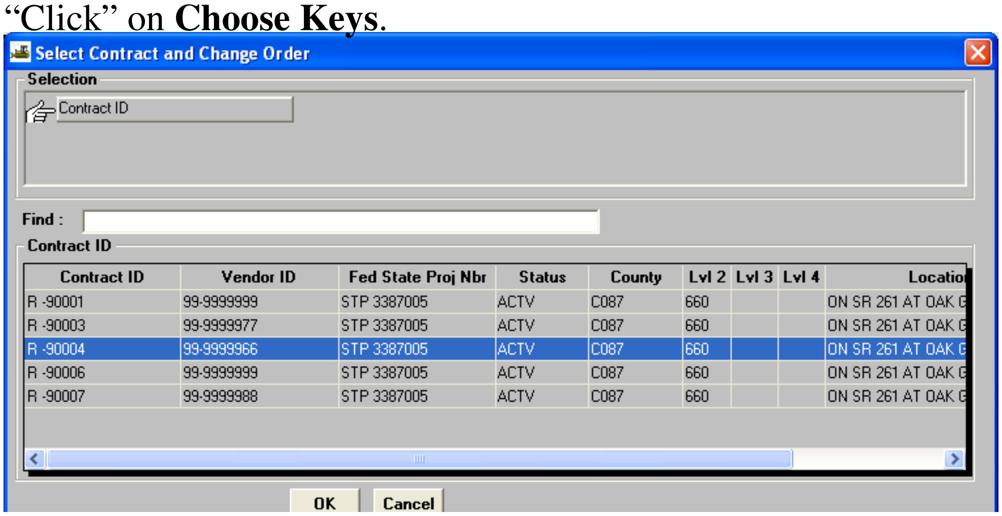


“Double-click” **Header**.



"Click" on **Services** located on the menu bar.

"Click" on **Choose Keys.**

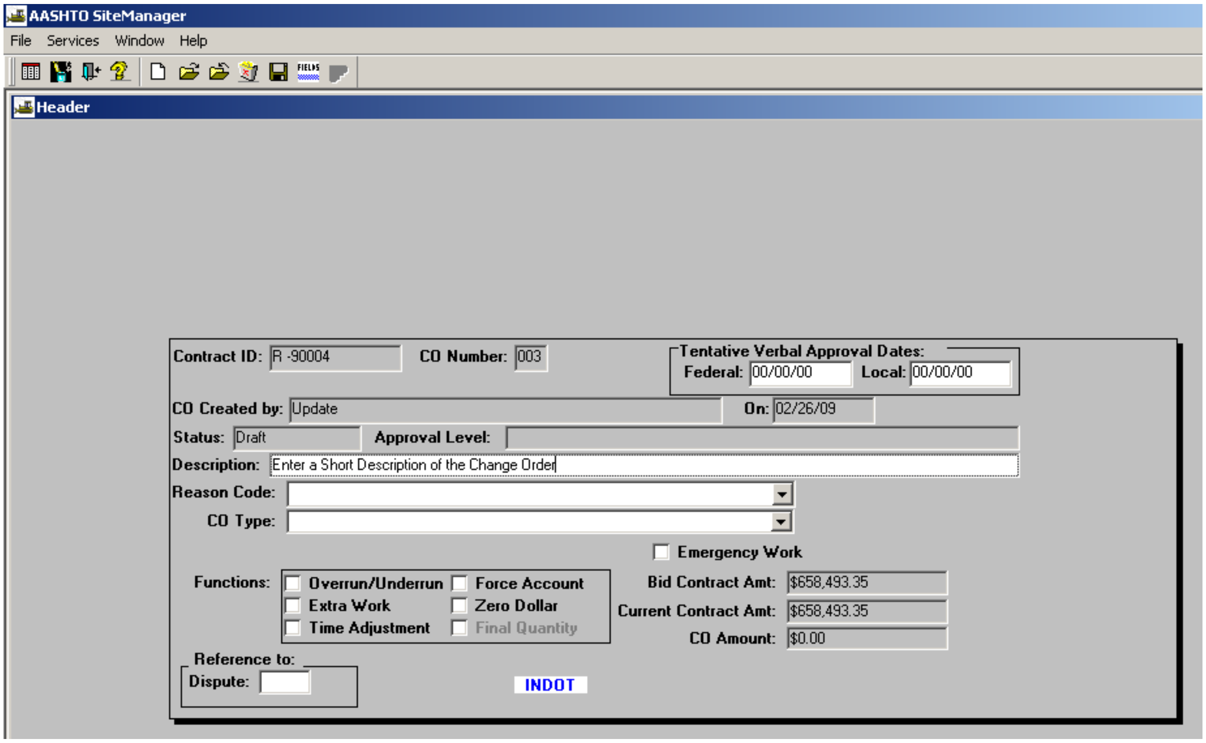


The **Select Contract and Change Order** panel opens.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

"Double-click" on the appropriate **Contract ID.**



he **Header** will open up with the **Contract ID** filled in.

CO Number: The **CO Number** is automatically populated by with the next available number.

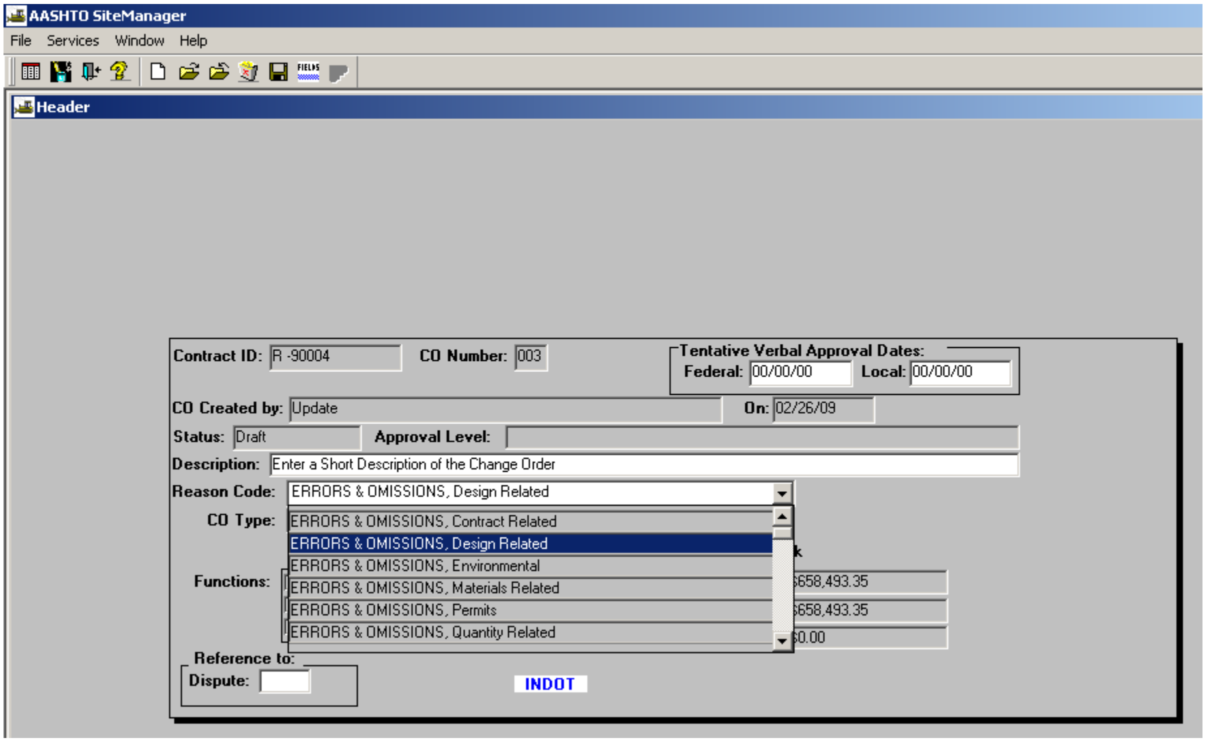
CO Created by: The **CO Created** by field is automatically populated with the **User ID** who created this change order.

On: The **On** field is automatically populated with the date that the Change Order was created.

Status: The **Status** field is automatically populated with **Draft** until items have been added to the Change Order.

Approval Level: The **Approval Level** field is automatically populated with the highest level a approval needed based on INDOT's current policy.

Description: this field is used to enter a short general description for entire change order.



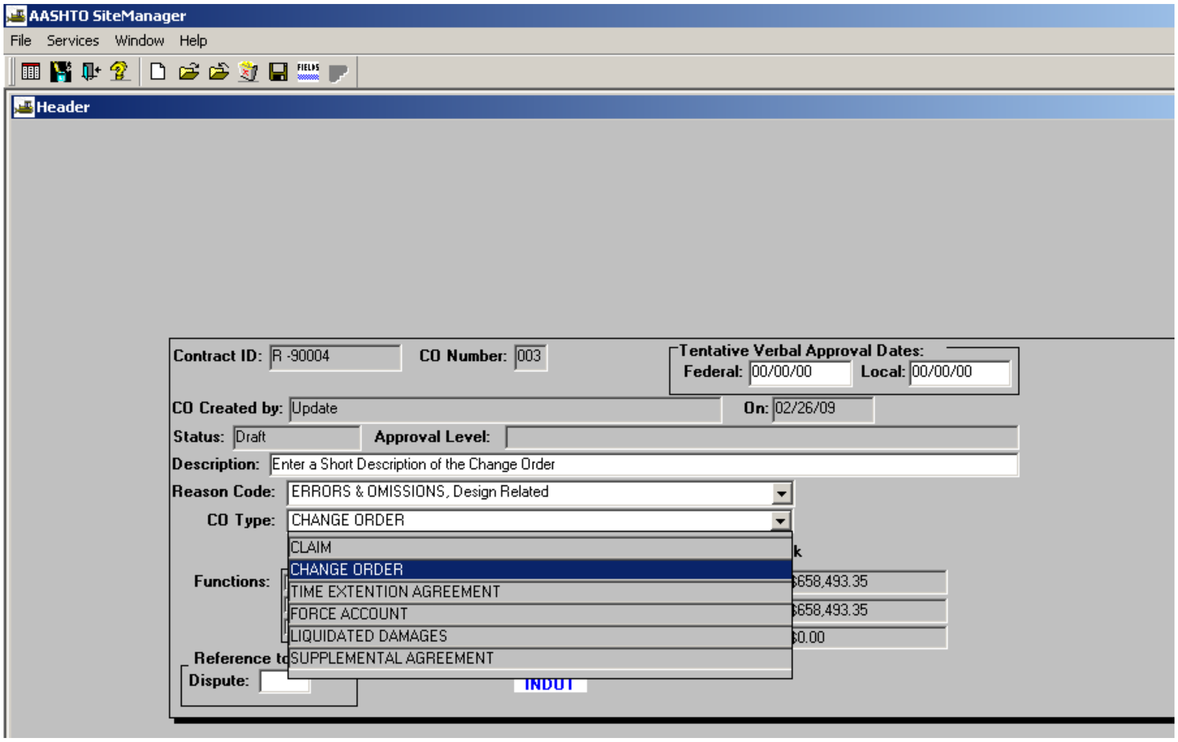
Reason Code: the **Reason Code** should clearly identify one specific impact to the Contract, the following are the general **Reason Codes**:

- **Errors & Omissions:** Errors and/or Omissions in the Contract Documents which prevents the contract from being constructed as intended.
- **Constructability**: Ability to be constructed.
- **Scope Changes**: A change in the project limits or design that revises the original intent of the Contract.
- **Changed Field Conditions**: Either an existing or new condition that could not have been reasonably foreseen by either INDOT or the Contractor prior to beginning the work.
- **Failed Material**: Material failures that result in penalties, reduced payment or replacement of items of work.
- **Incentive/Disincentive**: Monetary rewards or penalties added to a contract in addition to the normal Liquidated Damages clause.
- **Standards/Specs Change**: A change in the Contract Specifications as a result of a Department decision to initiate changes to active contracts on a Statewide basis.
- **Final Quantity Adjustment**: This is not utilized by INDOT.

"Click" on the **Reason Code** drop-down list.

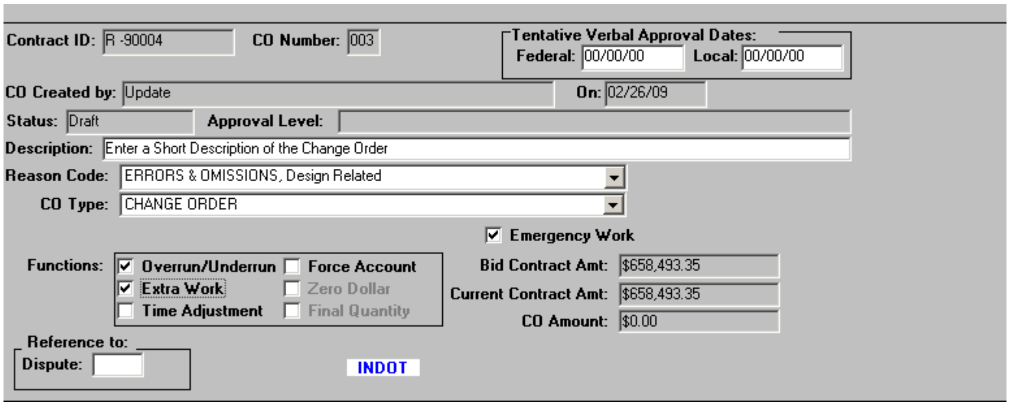
"Click" on an appropriate **Reason Code**.

NOTE: A new change order will be written for each separate **Reason Code**.



CO Type: identifies the specific type of Change Order.
"Click" on the appropriate change order type from the **CO Type** drop-down list.

- **Claim**: additional compensation due for work or material not clearly covered in the contract or not ordered as extra work.
- **Change Order**: A written order issued to the Contractor covering changes in the contract and establishing payment for the work affected by the changes.
- **Time Extension Agreement:** To adjust the completion time of a contract to best accomplish the scheduling objectives of the State.
- **Force Account:** Extra work in the contract for which the Contractor and the Department cannot reach agreement on the unit price or lump sum price prior to performing the work.
- **Liquidated Damages:** Monetary penalty, established in the contract, charged against the amount due the contractor for failure to complete within the time allotted for construction.
- **Supplemental Agreement:** Any agreement between INDOT and the Contractor subsequent to and in addition to the contract.



Emergency Work check box**:** In order to expedite the Change Order Review/Approval process, the user can select this indicator, which is linked to an 'Emergency' indicator on the **Change Order Review/Approval** window. The Emergency indicator alerts approvers that the change order is for **Emergency Work**.

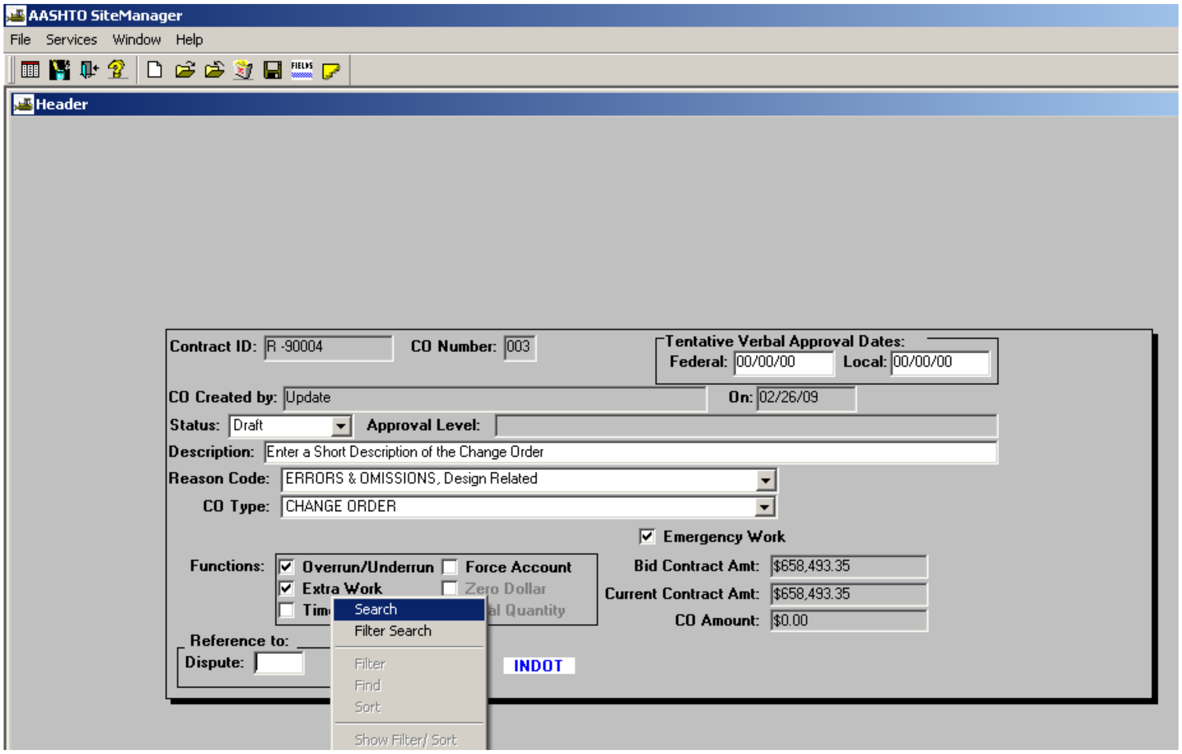
"Click" the **Emergency Work** check-box if this change order involves emergency work.

The purpose of the Change Order is defined as its **Function**. With the exceptions of the **Zero Dollar** and the **Final Quantity** change orders, a change order may have multiple functions checked, but they <u>must</u> be related to the same **Reason Code**.

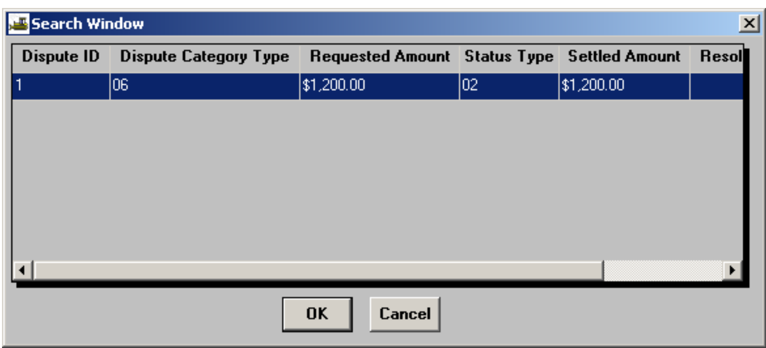
- **Overrun/Underrun** – **Overrun/Underrun** is used when quantity is added or subtracted from an existing contract item.
- **Extra Work – Extra Work** is used when additional work items are required to complete the contract.
- **Time Adjustment – Time Adjustment** is used when the time needs to be adjusted to reflect the changed time period for a milestone or contract.
- **Force Account – Force Account** is used for extra work in the contract for which the Contractor and the Department cannot reach agreement on the unit price prior to performing the work. A **Force Account** CO requires adding a new line item to the contract. Only one new line item is allowed per **Force Account** change order.
- **Zero Dollar – Zero Dollar** is used for contract adjustments that will not affect the dollar amount of the contract. **Zero Dollar** change orders ***cannot*** include any other functions.
- **Final Quantity – Final Quantity** will not be utilized by INDOT. INDOT will use **Overrun/Underrun** Change Orders to balance quantities at the end of a contract.

"Click" the appropriate check boxes from the **Function** field.

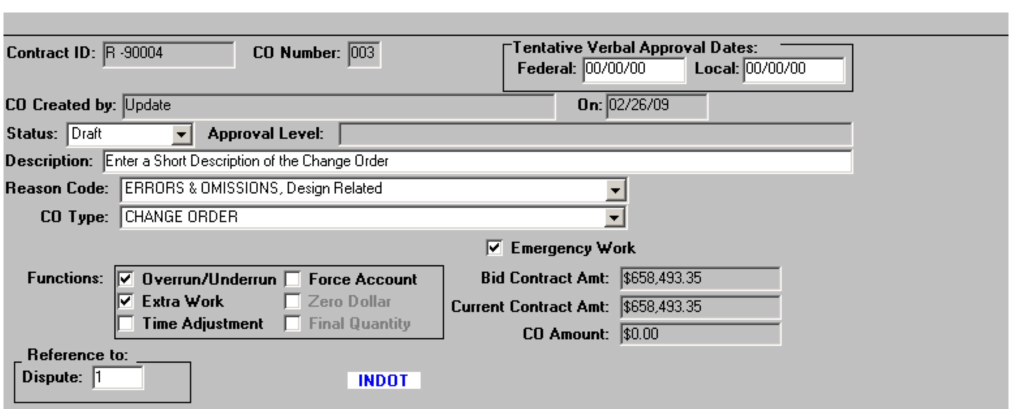
Bid Contract Amt: The original dollar value of the contract.
Current Contract Amt: The original dollar value plus the dollar value of any approved Change Orders.
CO Amount: The current change order dollar value.



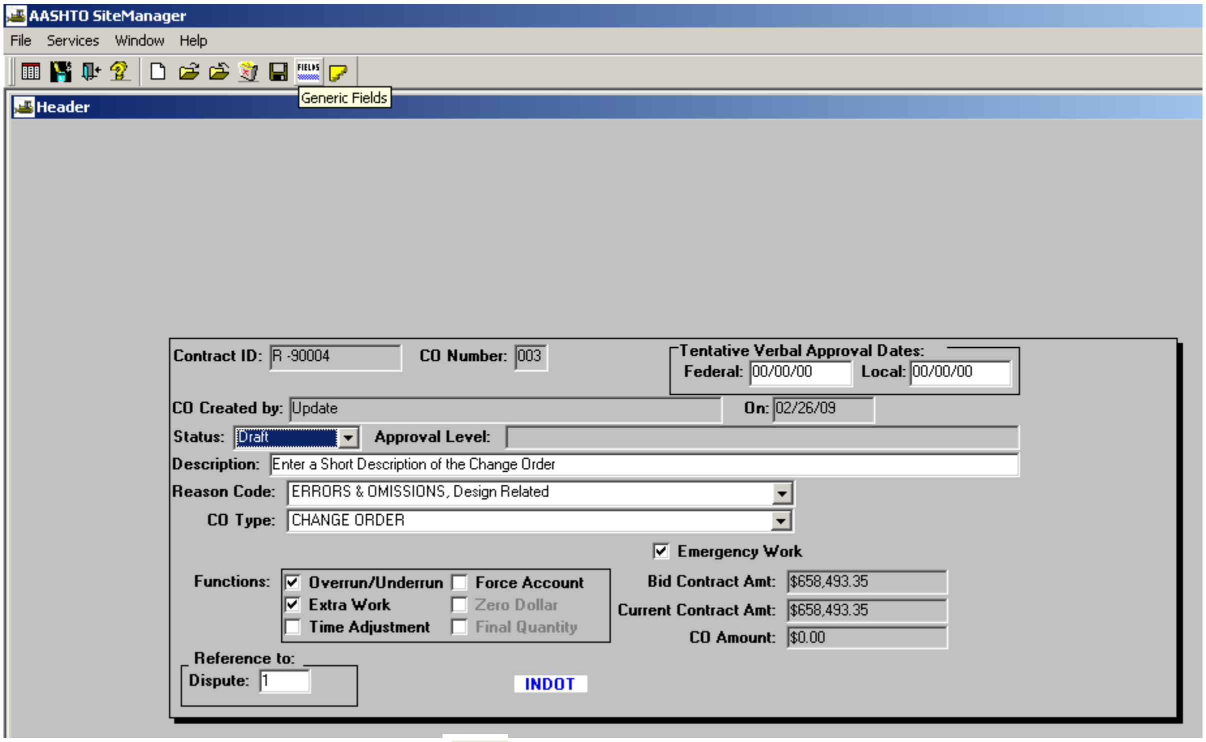
If the change order is related to a **Dispute**, "right-click" on the **Dispute** field within the **Reference to:** box and "click" on **Search**.



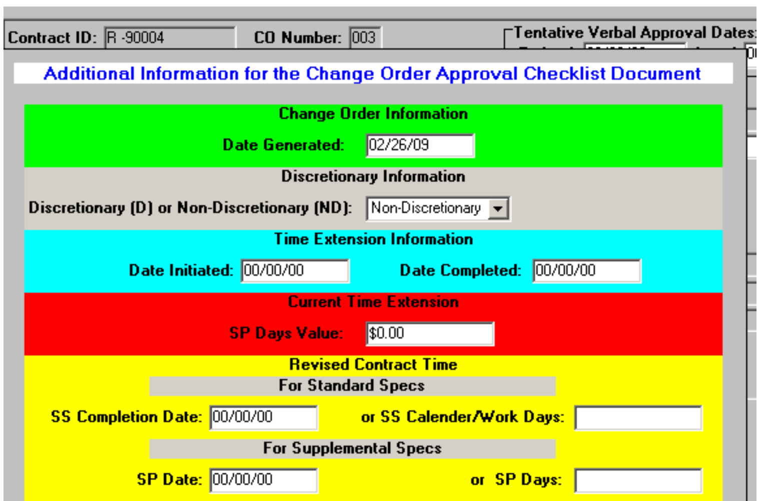
"Double-click" on the appropriate **Dispute ID**.



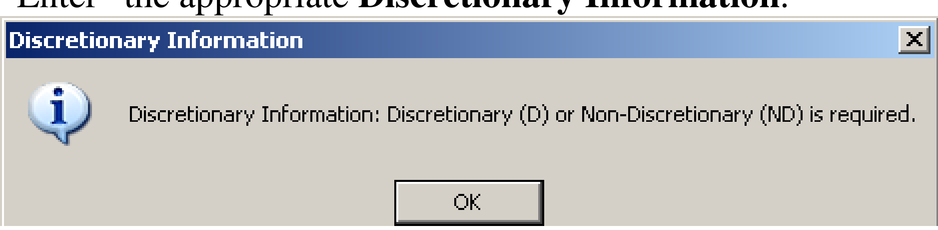
The selected **Dispute ID** number will populate the **Referenced to**: field.



"Click" on the Generic Field located on the toolbar.



Additional Information for the Change Order Approval Checklist Document opens.
"Enter" the appropriate **Date Generated** for the Change Order.
Discretionary Information field is required to be filled in and will not allow the Change Order to be completed without it.
"Enter" the appropriate **Discretionary Information**.



This message will appear when the CO is changed to pending if the information is not entered.

To close "Click" on the **Generic Field** located on the toolbar.
"Click" the **Save** button located on the toolbar.

Documents can be added to the change order Header by using the **Attachments** button located on the toolbar.

Attachments

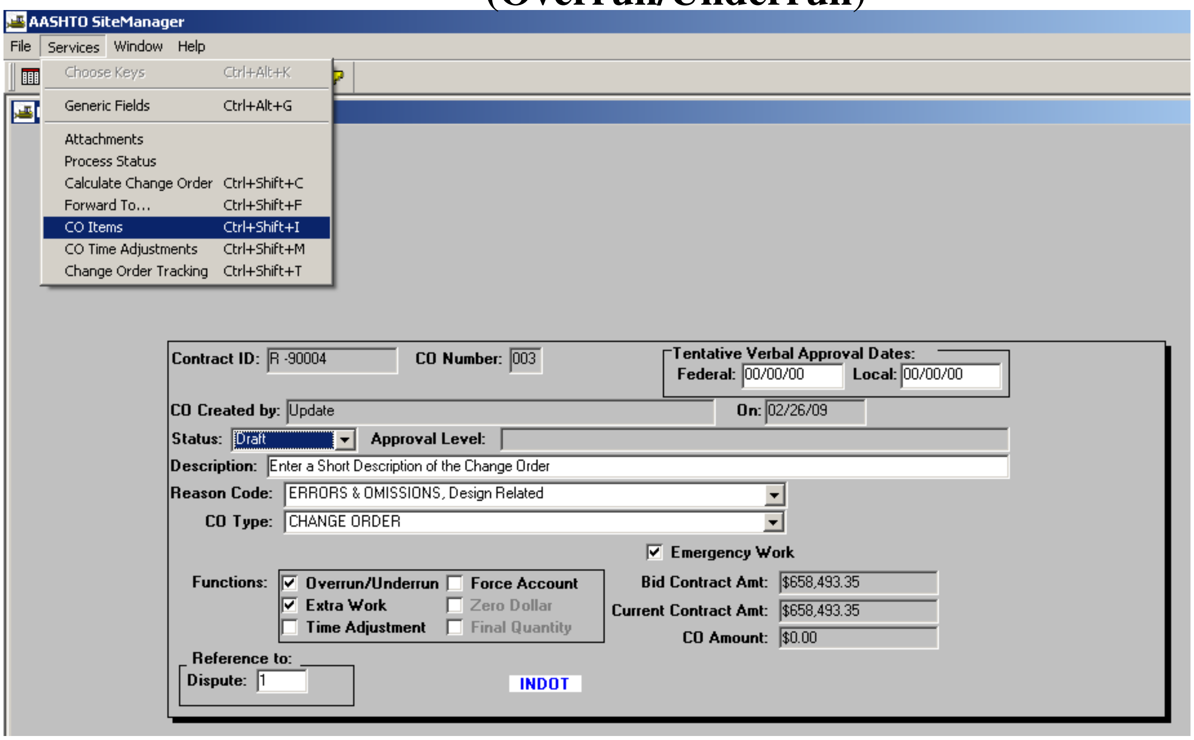
The Attachment icon will appear without a paperclip if there are no attachments associated with the record in the currently opened window.

The Attachment icon will appear with a paperclip if attachments are associated with the record in the currently opened window.

To create an attachment see training document **A-2-11-1 Attaching a Document**

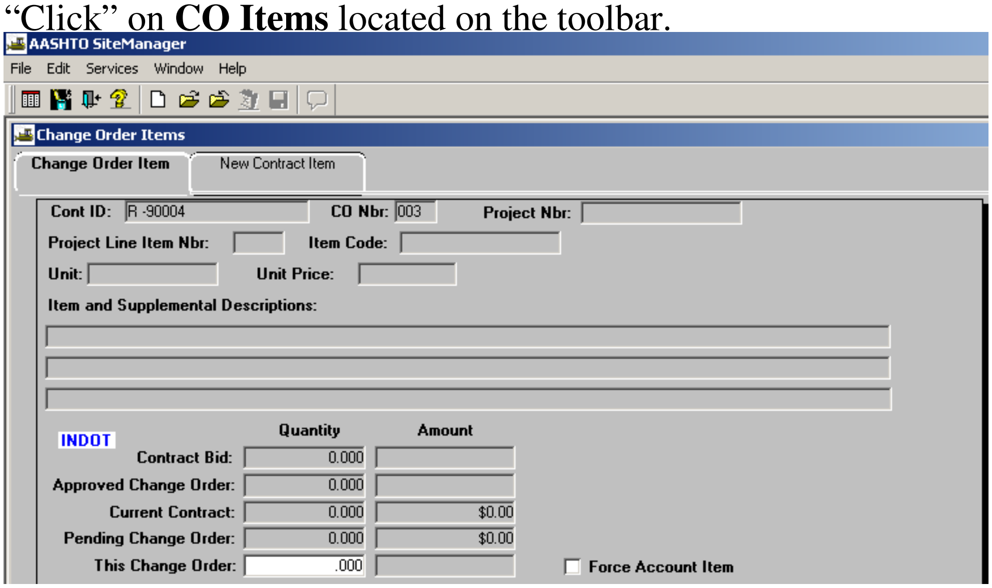
Adding additional Quantities to an Existing Contract Item

(Overrun/Underrun)

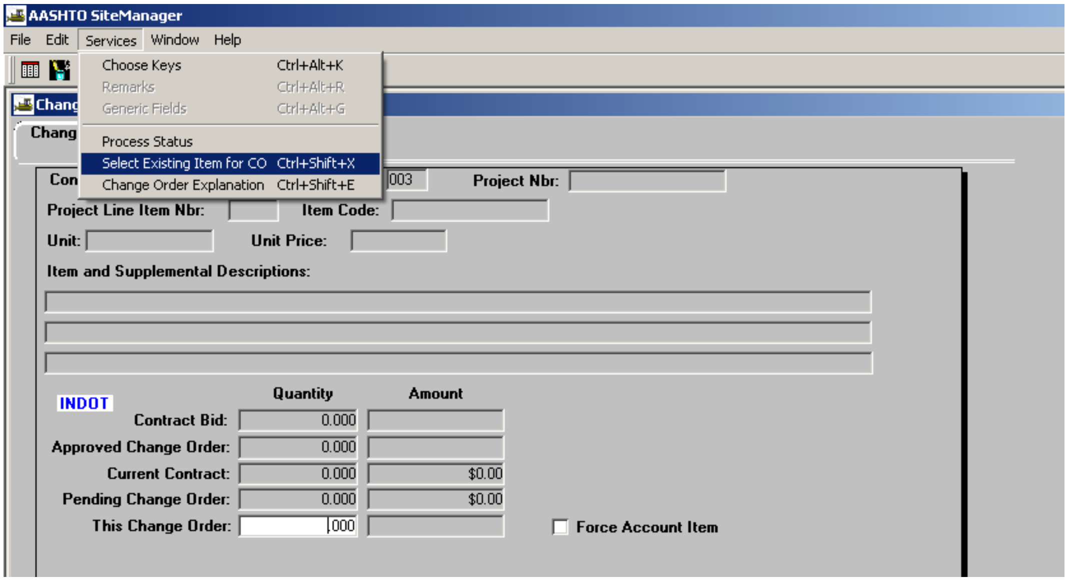


"Click" on **Services** located on the toolbar.

"Click" on **CO Items** located on the toolbar.

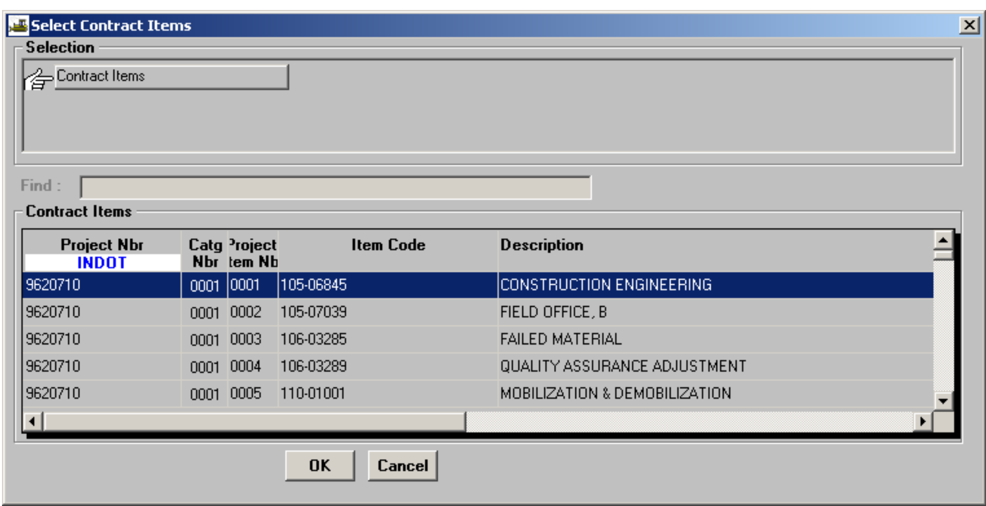


The Change Order Items window opens up.

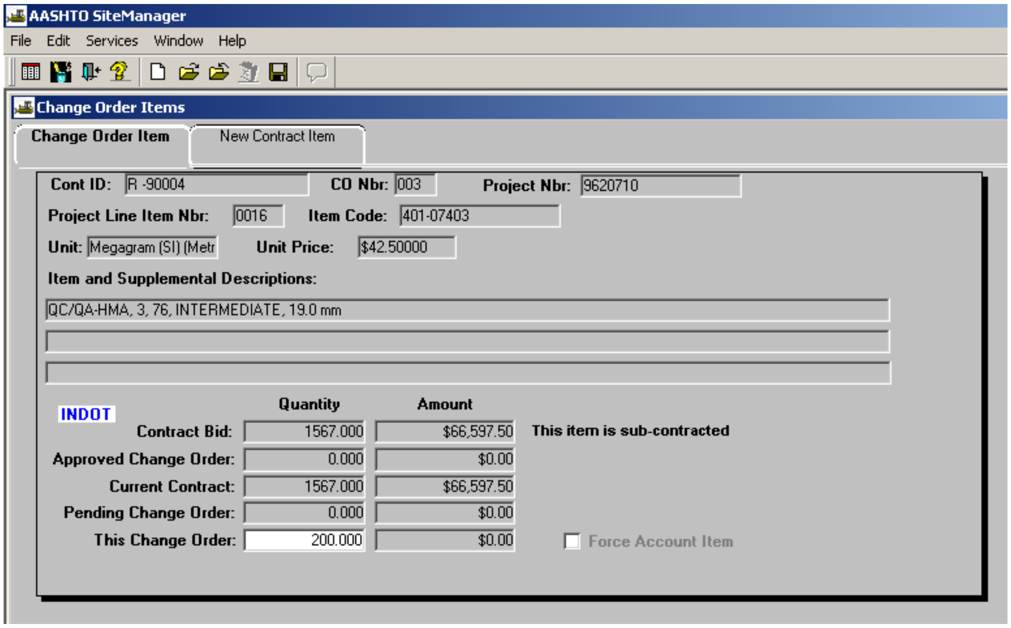


"Click" on **Services** located on the toolbar

"Click" on **Select Existing Item for CO** from the dropdown.



The **Select Contract Items** window opens up. "Double-Click" on the appropriate **Project Nbr** and **Item Nbr**.



The **Change Order Items** window opens up with the appropriate **Project Line Item Nbr** information populated. Verify that the correct item was selected and that all of the information is correct.

“Enter” the appropriate quantity in the **This Change Order: Quantity** field

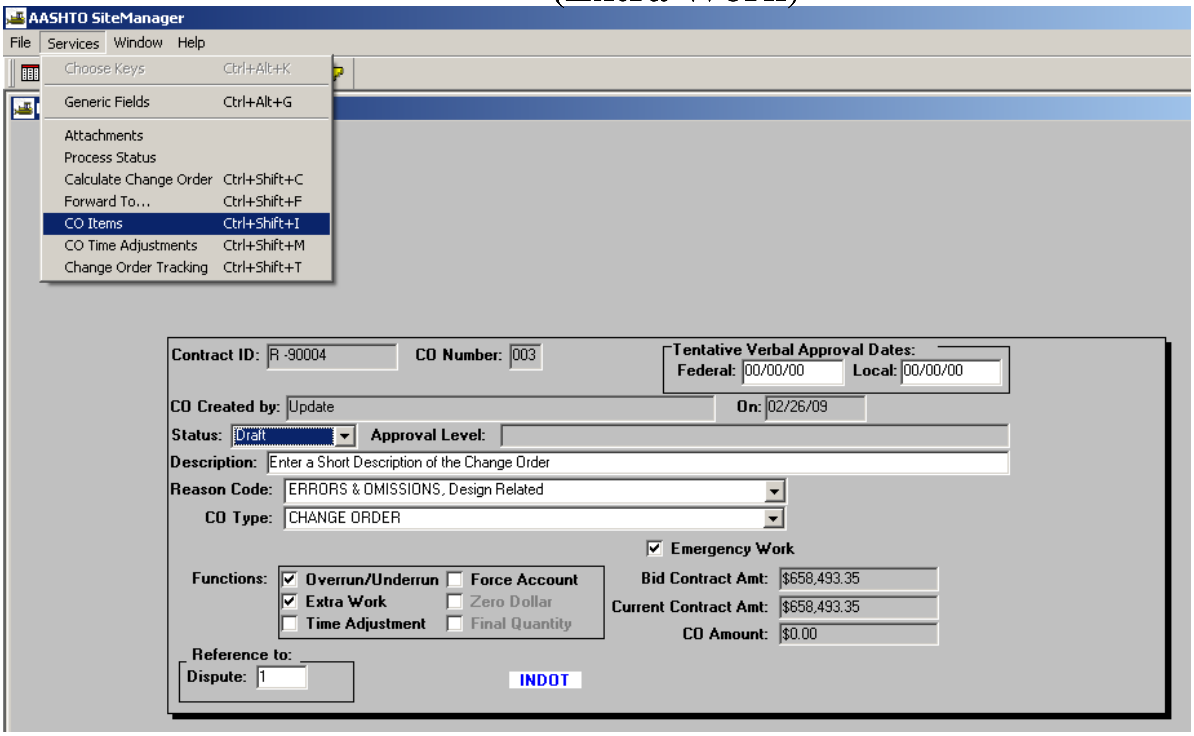
“Click” on **Save** located on the toolbar. The **Amount** will calculate for this item to the right of the Quantity for **This Change Order**.

If another item is to be added to this change order, “Click” on **Services** located on the toolbar

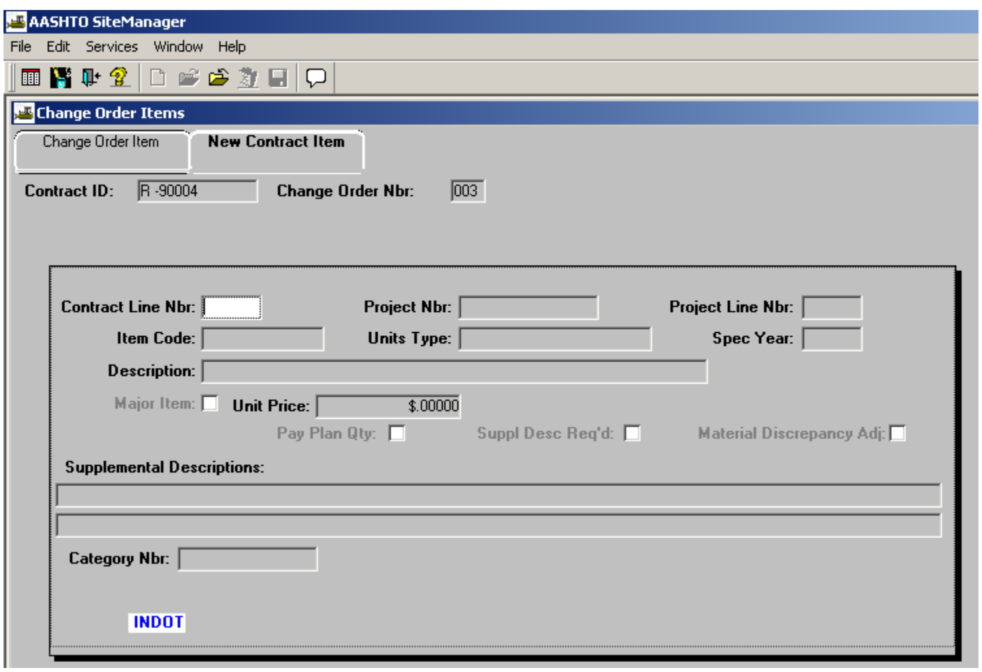
“Click” on **Select Existing Item for CO** located on the toolbar and then select appropriate item and repeat steps for each item added to the change order.

Then “click” on **Save** located on the toolbar.

Adding a New Contract Item
(Extra Work)

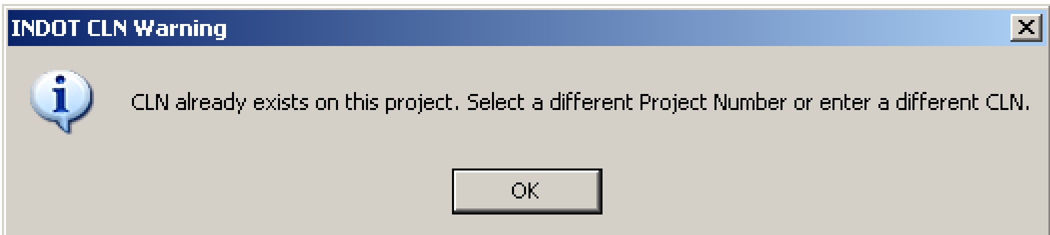


From the **Header** window "click" on **Services** located on the toolbar.
"Click" on **CO Items** located on the toolbar.
(If **Change Order Items** window is still open. "Click" on the **New**🗋 button located on the toolbar. Then "click" on the **New Contract Item** tab)

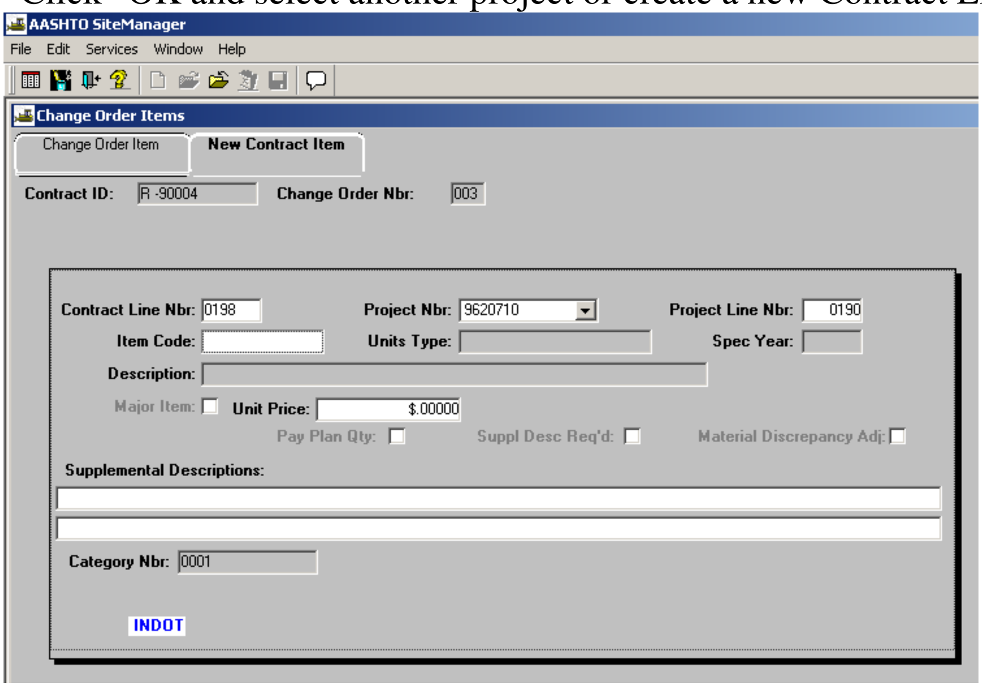


"Enter" the new contract line number in the **Contract Line Nbr** field.
Use the Tab key on the keyboard to open the rest of the fields for the new item.

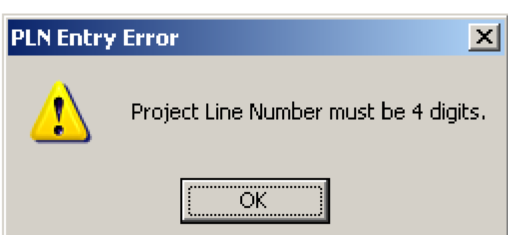
The contract line number must be 4 digits. If 4 digits are not entered this message will appear.
“Click” OK and “enter” the appropriate new **Contract Line Nbr**.



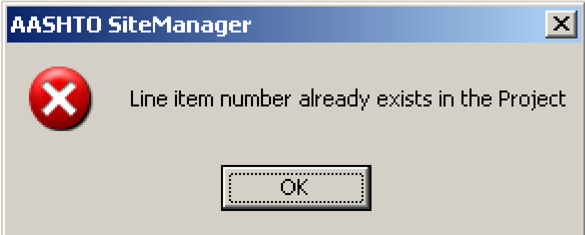
If the contract line number exists on the project that is selected this message will appear.
“Click” OK and select another project or create a new Contract Line Nbr.



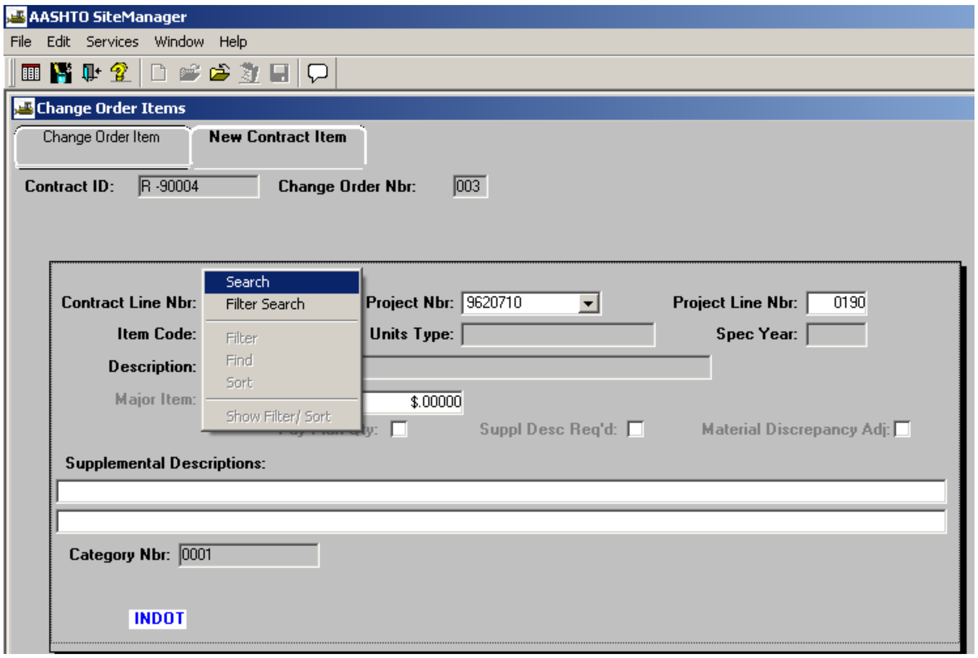
“Enter” the new project line number in the **Project Line Nbr** field.



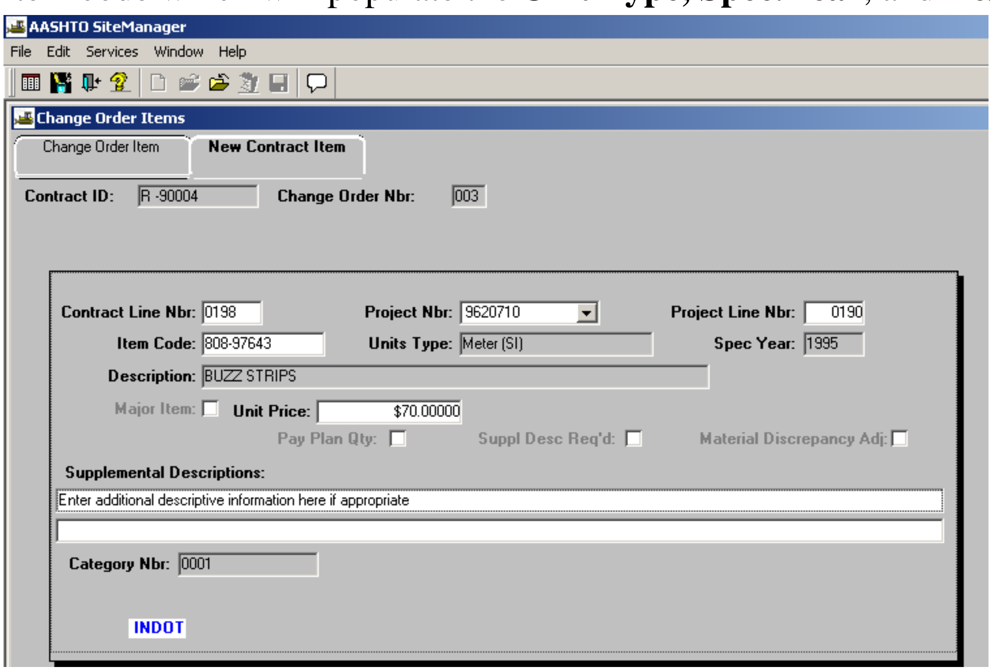
The project line number must be 4 digits. If 4 digits are not entered this message will appear.
“Click” OK and “enter” the appropriate new **Project Line Nbr**.



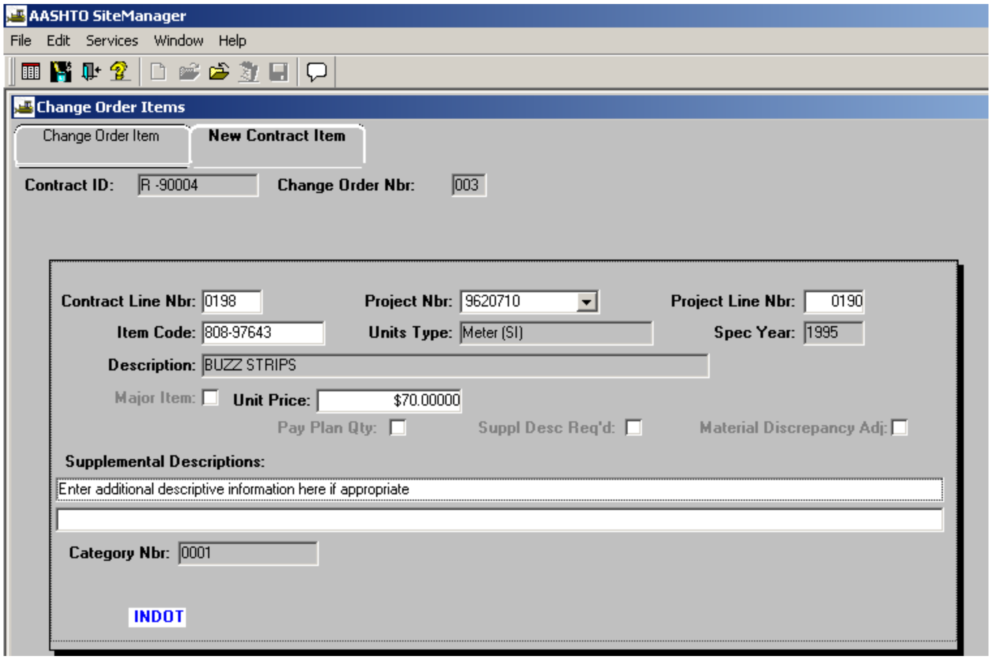
If the project item number entered is an existing project item on the contract this message will appear. “Click” **OK** and enter the new **Project Line Nbr.**



“Right-click” on the **Item Code** field then “click” on **Search** to locate the appropriate item code which will populate the **Unit Type, Spec.Year**, and **Description** fields.

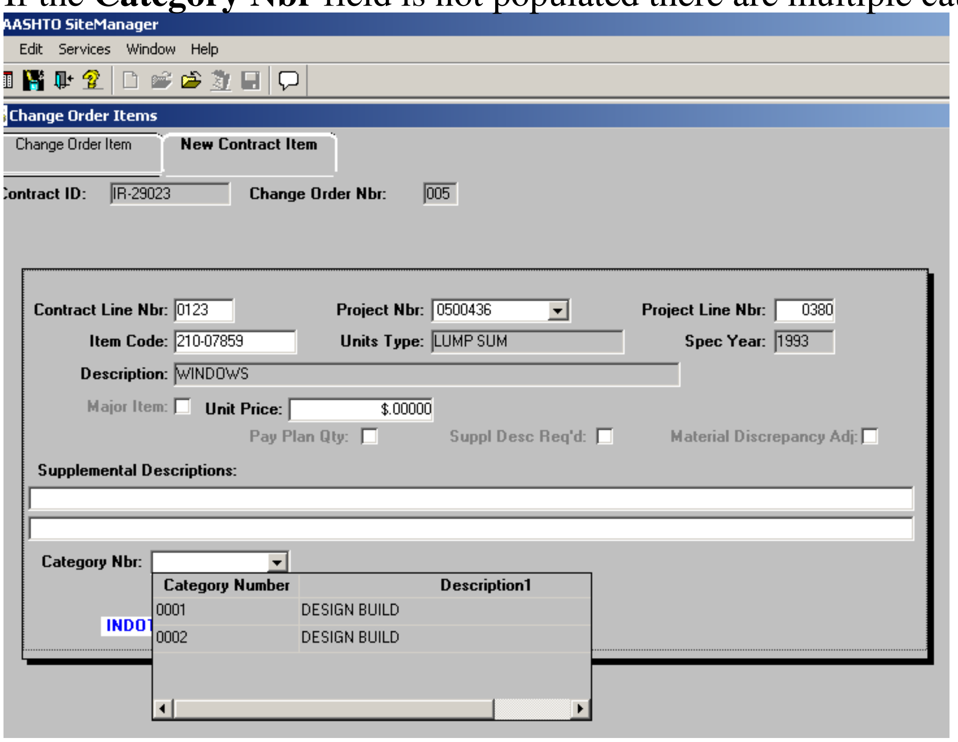


“Enter” the appropriate unit price in the **Unit Price** field.
“Enter” additional description in the **Supplemental Description** field, if appropriate.

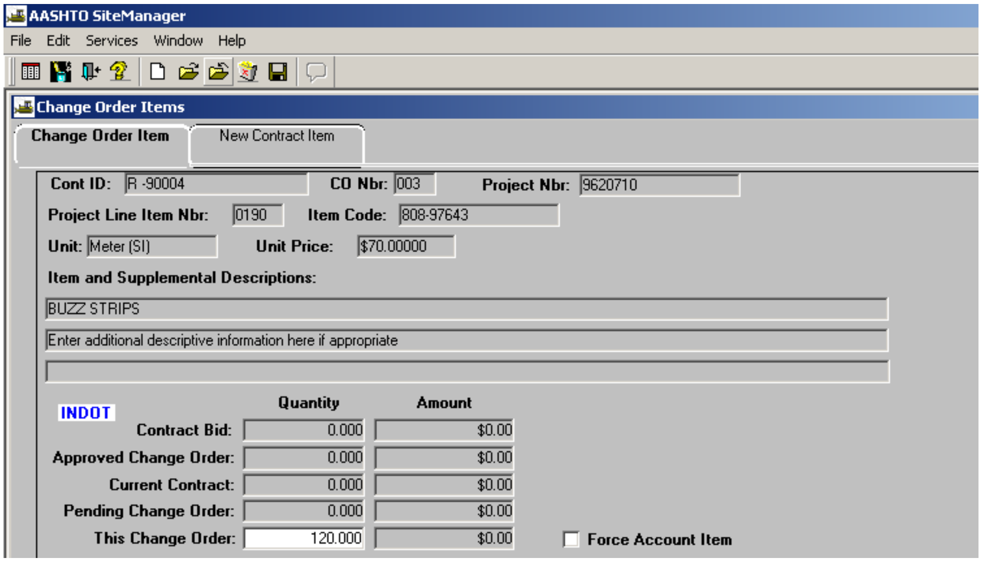


The **Category Nbr**. automatically populates if the contract has only one category.

If the **Category Nbr** field is not populated there are multiple categories.



"Click" the dropdown arrow and "click" on the appropriate Category number.

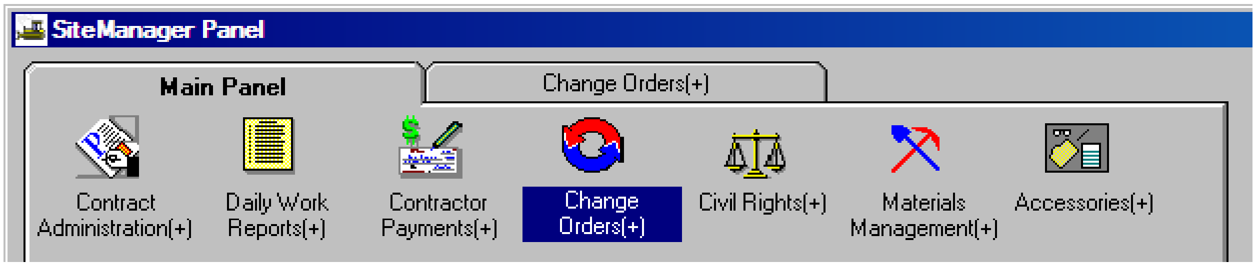


“Click” on the **Change Order** tab and “enter” the **Quantity** in the **This Change Order** field.

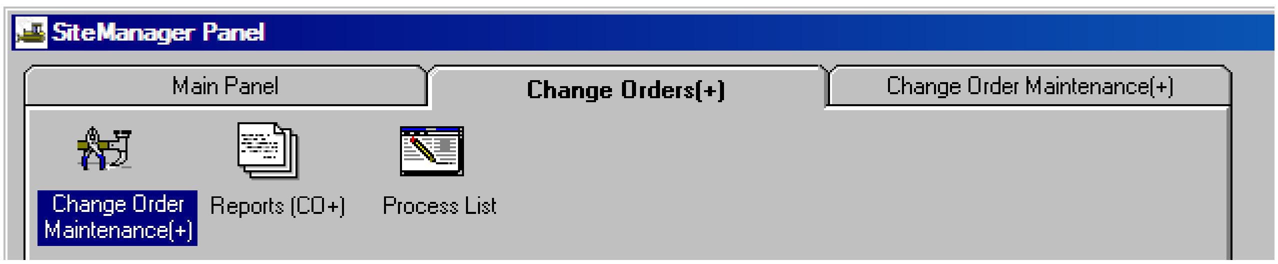
“Click” on the **Save** button located on the toolbar to calculate the **Amount** for this new item.

Deleting Project Line Numbers from a DRAFT status Change Order

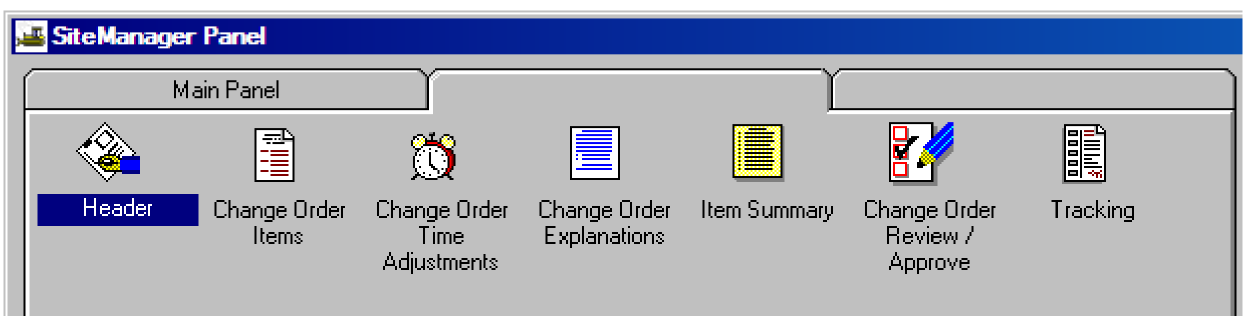
(Not an original contract item or an item from a previous Change Order)
This is to be used when a new project line item is being removed from a change order where the item was established.



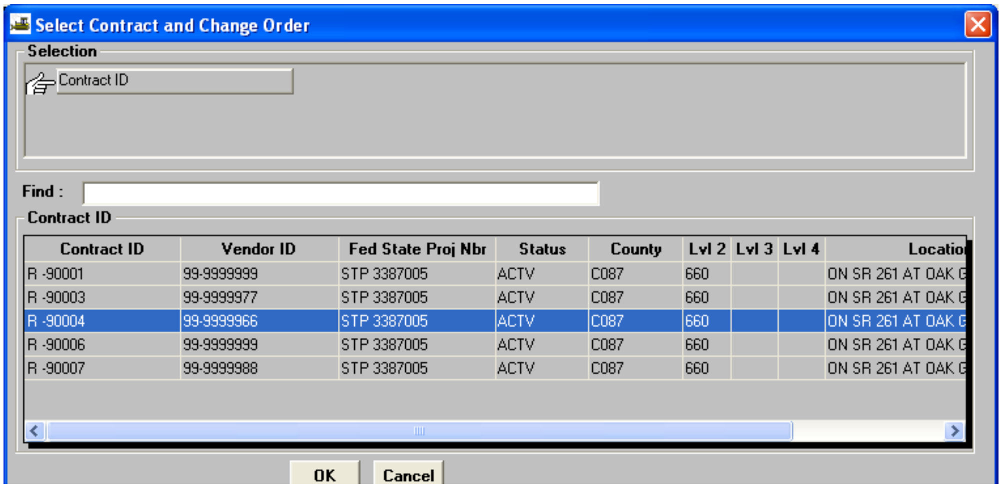
From the Main Panel, "double-click" **Change Orders (+)**.



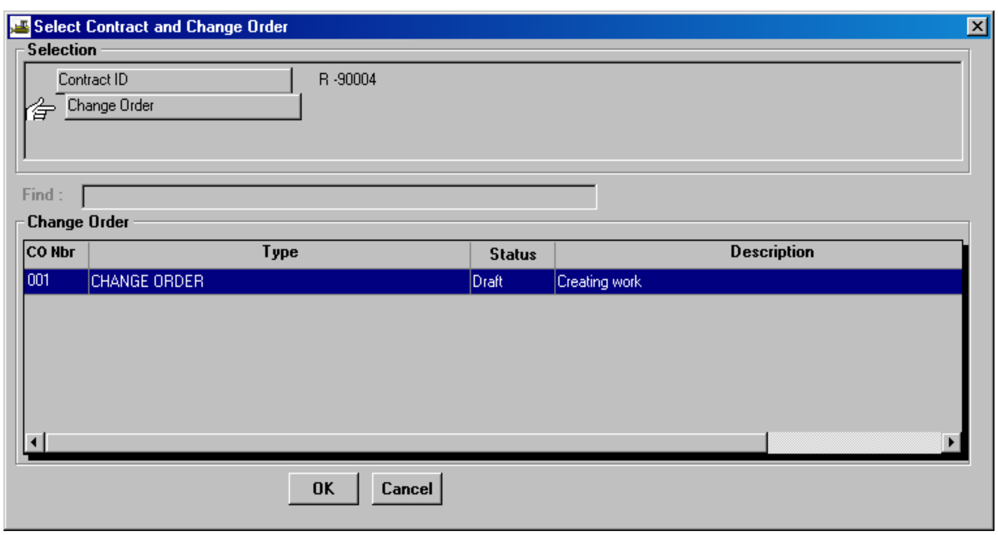
"Double-click" **Change Order Maintenance (+)**



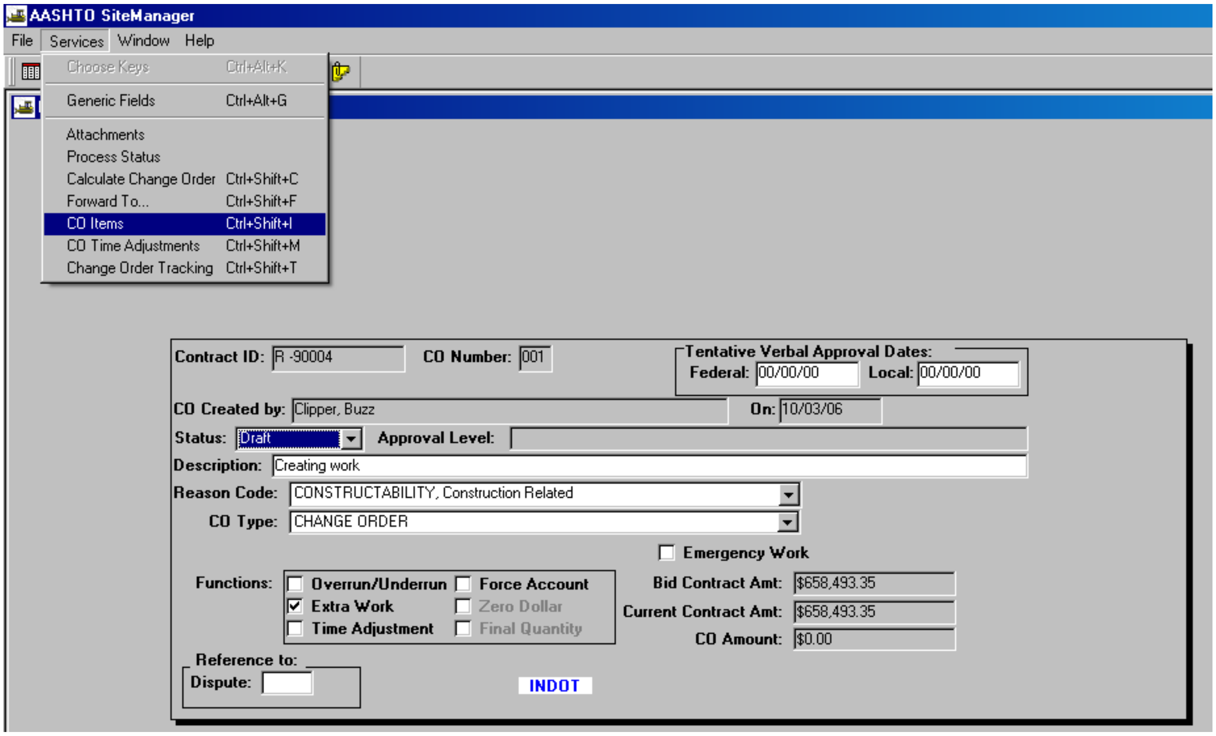
"Double-click" **Header**.



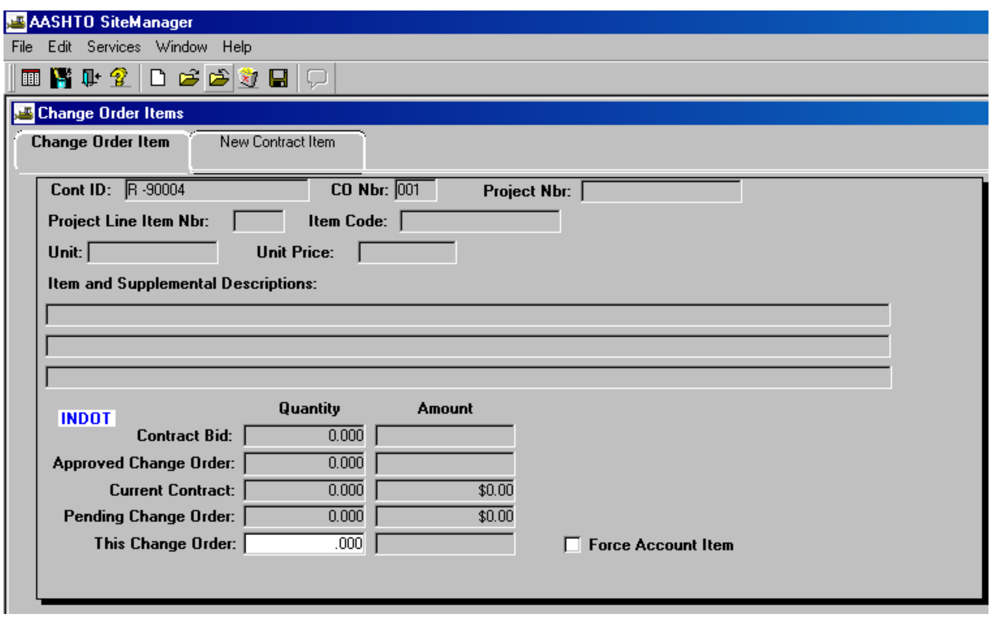
"Double-click" on the appropriate **Contract ID.**



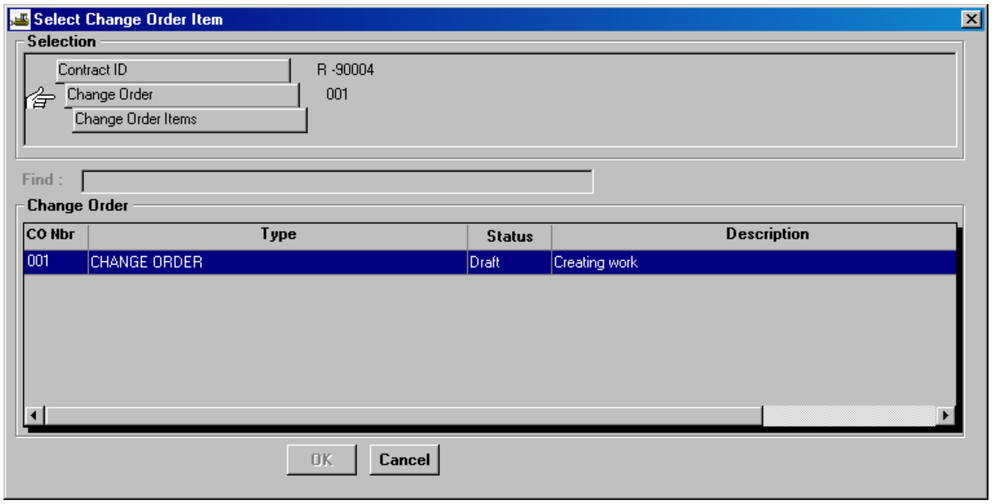
"Double-click" on the appropriate **CO Nbr**.



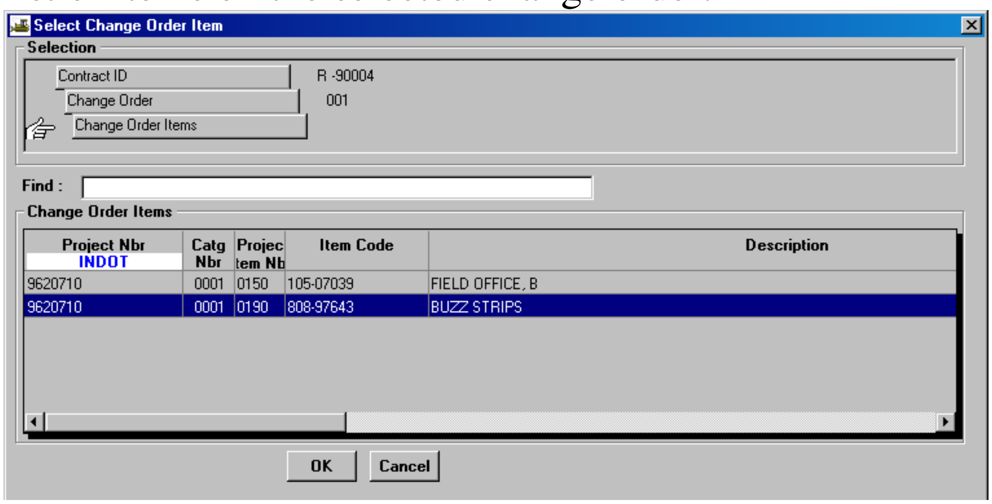
Verify the contract is in **Draft Status**.
"Click" on **Services** locate on the toolbar.
"Click" on **CO Items**.



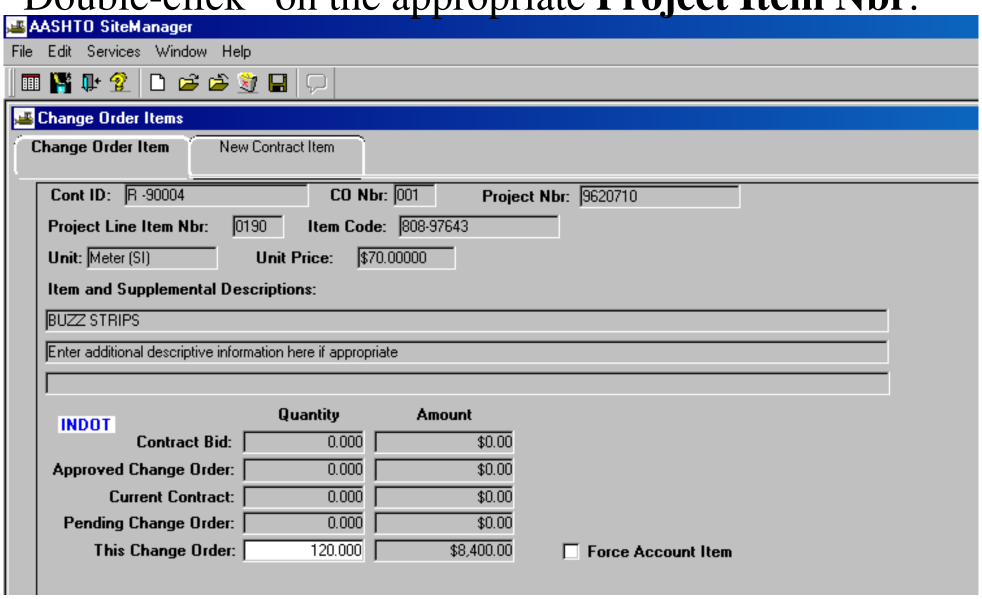
"Click" on the **Open** button locate on the toolbar.



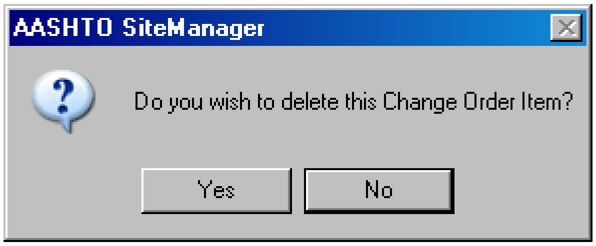
"Click" on the **Change Order Items** button in the top panel to bring up the list of items on the selected change order.



"Double-click" on the appropriate **Project Item Nbr**.



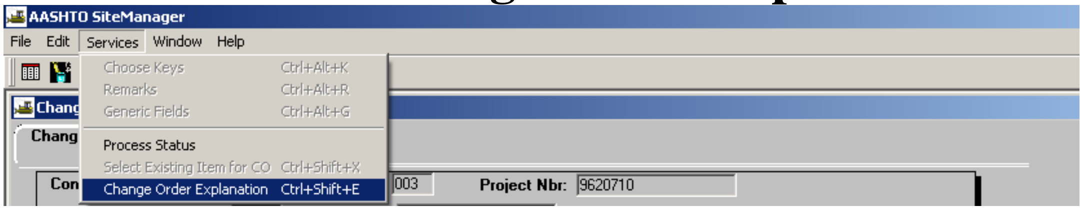
"Click" on the **Delete** button located on the toolbar.



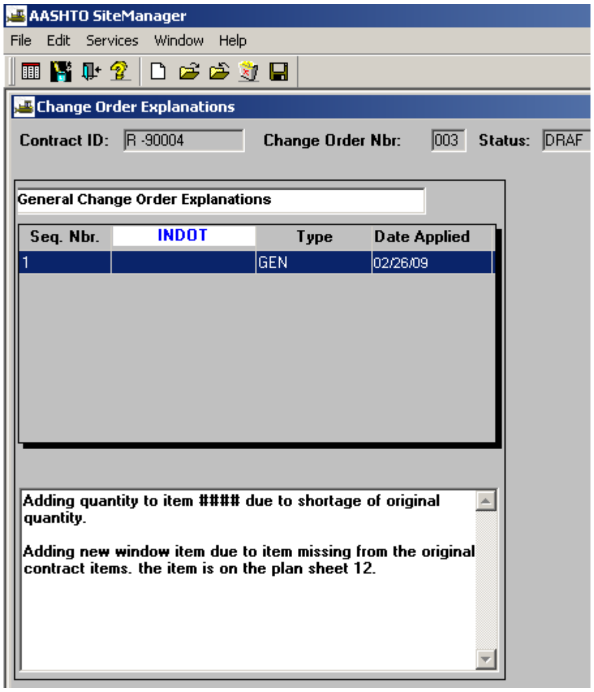
"Click" **Yes** to confirm the deletion of this **Change Order Item**.

"Click" the Close button located on the toolbar.

Change Order Explanation



“Click” on **Services** located on the toolbar.
“Click” on **Change Order Explanations**.



“Type” in the explanation for the change order.
“Click” the Save button located on the toolbar.

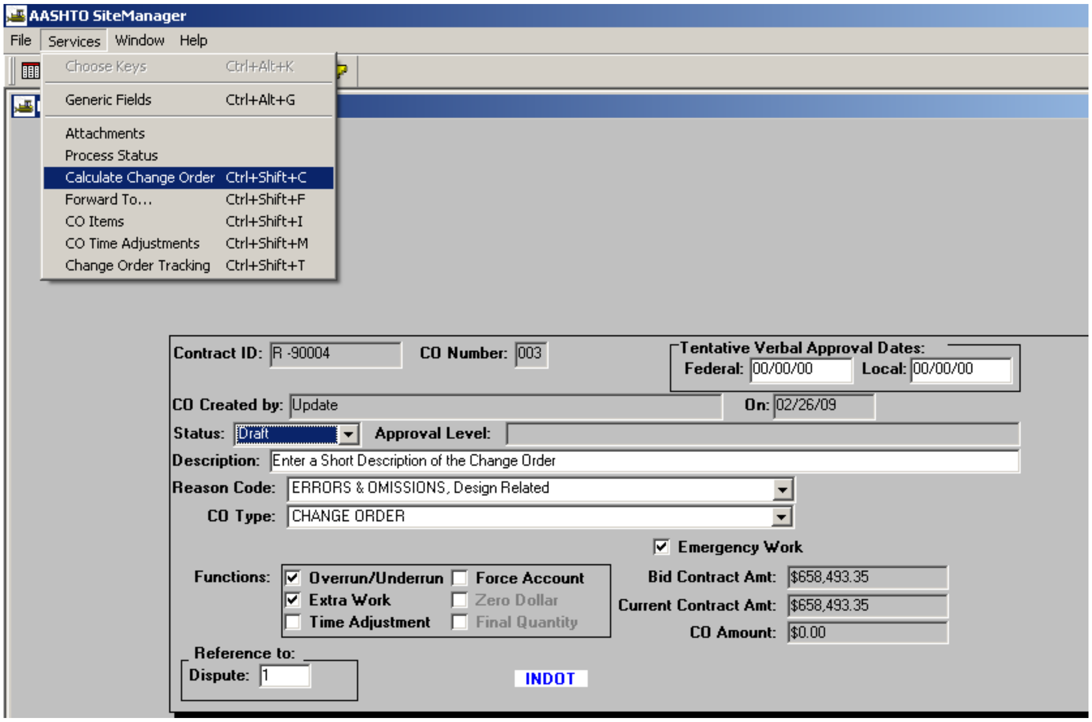
Additional explanations can be entered for the change order by “Clicking” on **New** and adding additional explanations.

“Click” on **Save** located on the toolbar.

“Click” on the **Close** located on the toolbar.

“Click” on the **Close** located on the toolbar again, this should bring you back to the **Header**.

Calculating the Change Order



"Click" on **Services** located on the toolbar.

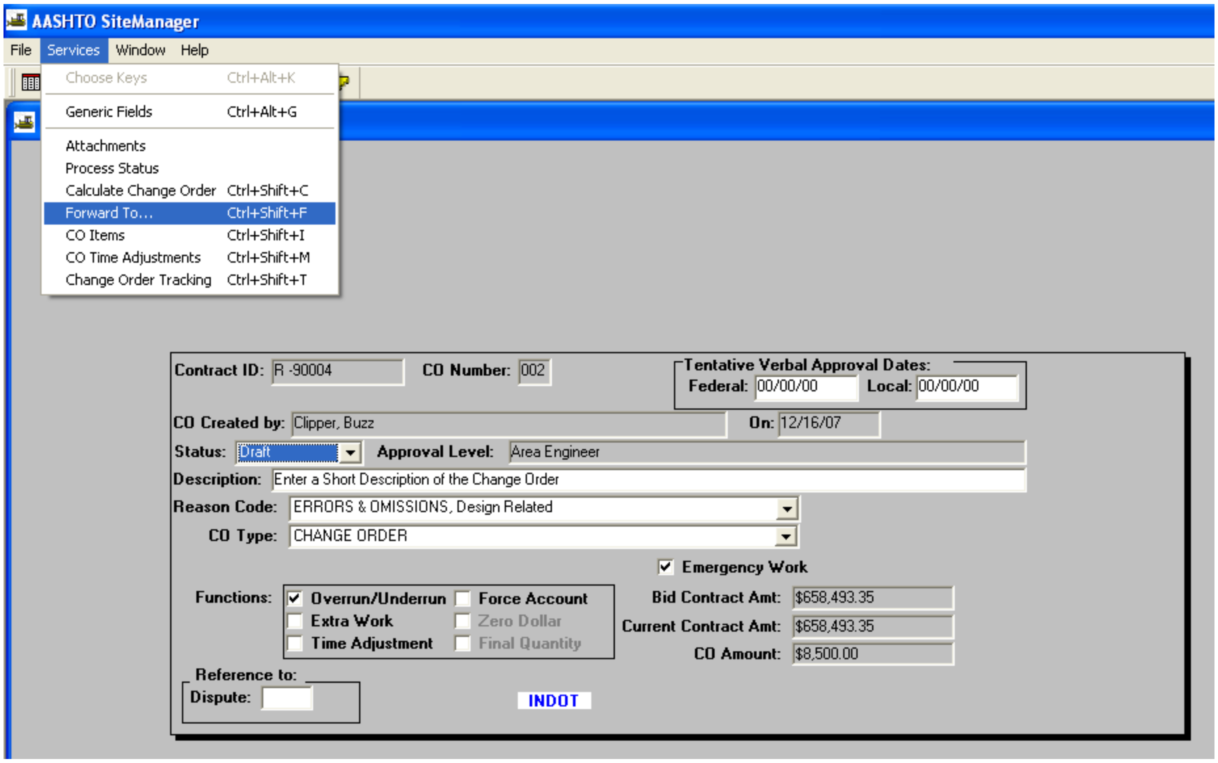
"Click" on **Calculate Change Order**.

The **CO Amount** field will then automatically be populated with the total amount for this change order.

Verify that all of the information is correct, then "click" on **Save** located on the toolbar.

Forwarding a Change Order for Review

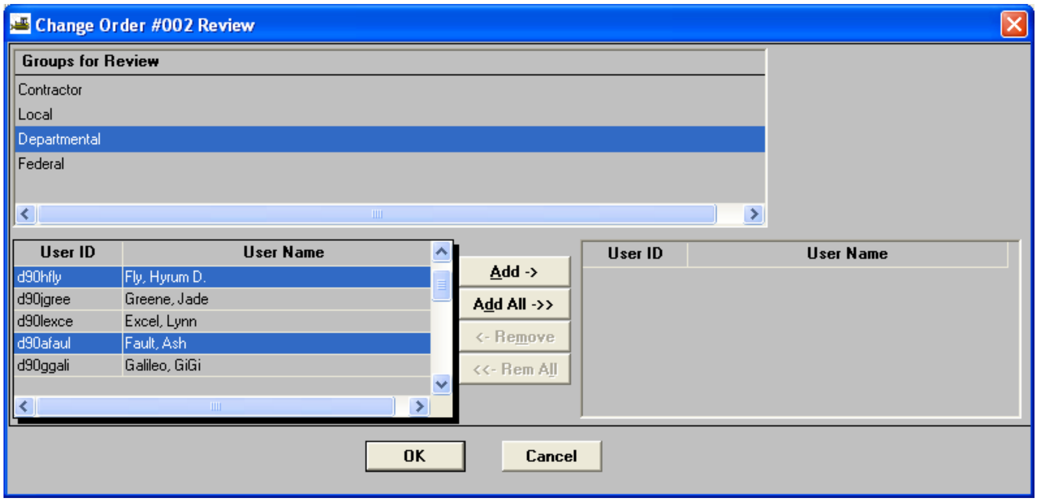
While a **Change Order** is still in the **Draft** Status it can be reviewed by others who have Contract Authority to that contract. It will not be approved or denied, but simply reviewed.



While viewing the **Header**.

“Click” on **Services** located on the toolbar.

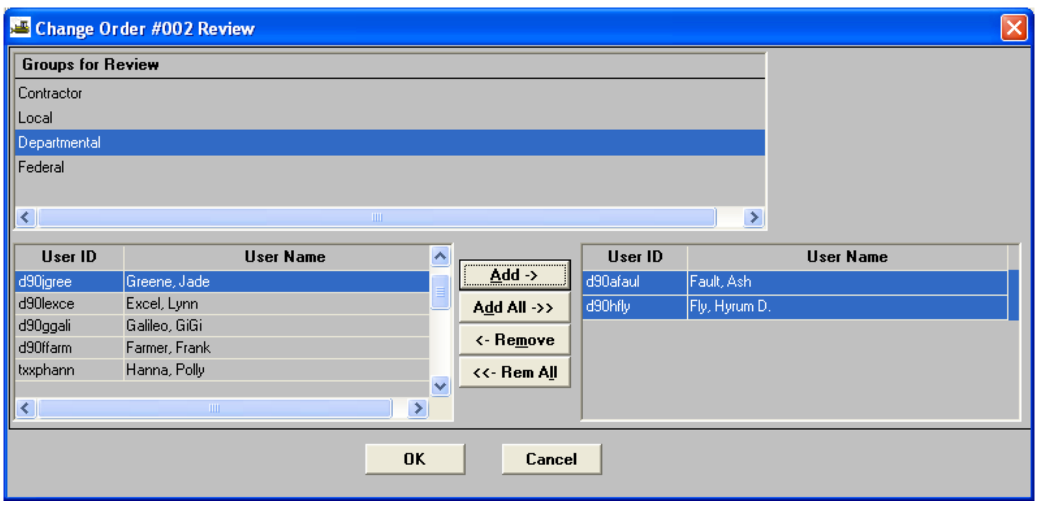
“Click” on **Forward To…**



"Click" on the appropriate **Groups for Review** in the top panel.

"Click" on the appropriate **User ID** from each **Groups for Review** in the bottom left panel.

Then "click" the **Add** button and the **User ID/User Name** will move to the right.

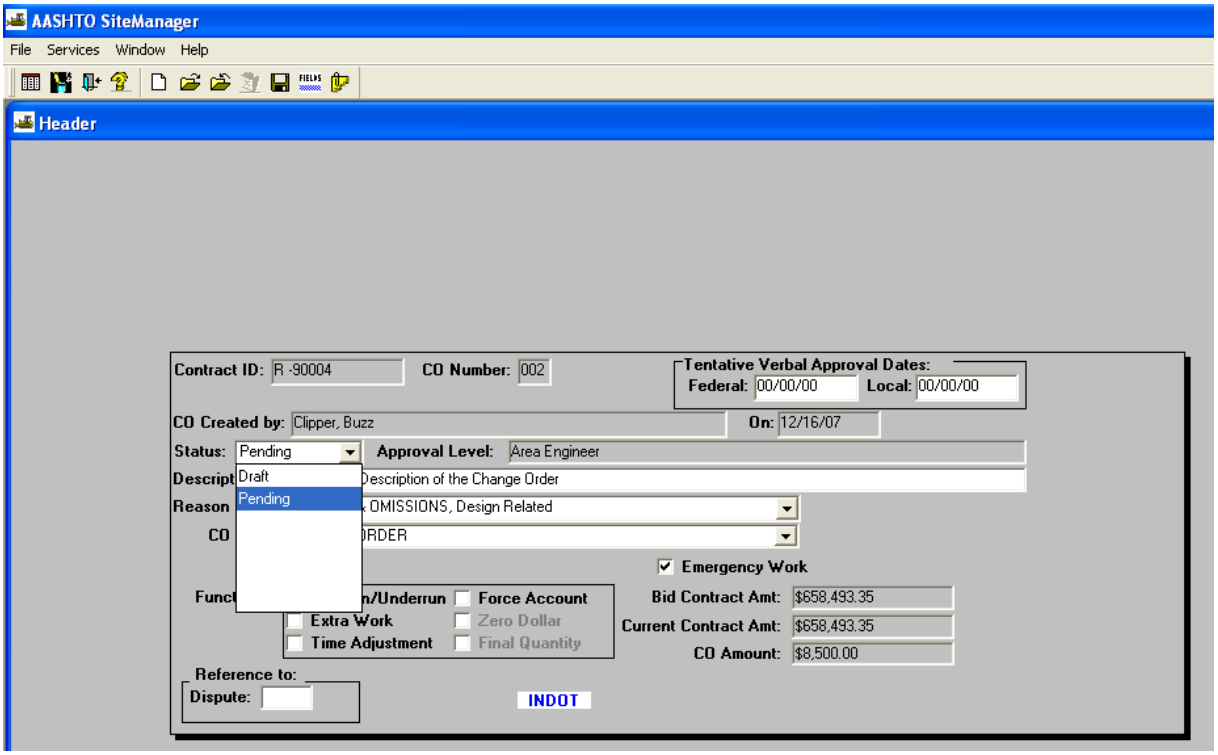


Then "click" on **OK**.

"Click" on Save located on the toolbar.

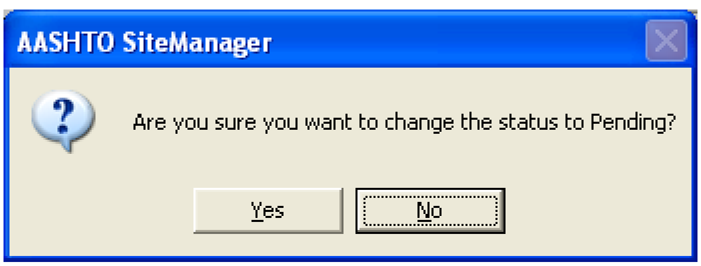
This message will appear when the e-mail(s) have been sent to the SiteManager Inbox of the reviewer(s).

Forwarding the Change Order for Approval



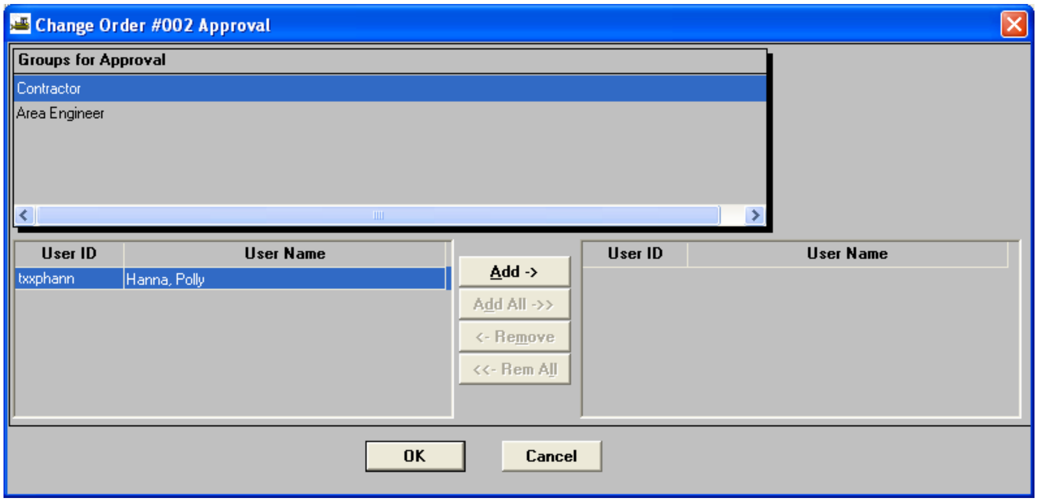
From the Change Order **Header** change the Status from **Draft** to **Pending**.

"Click" on **Save** located on the toolbar.



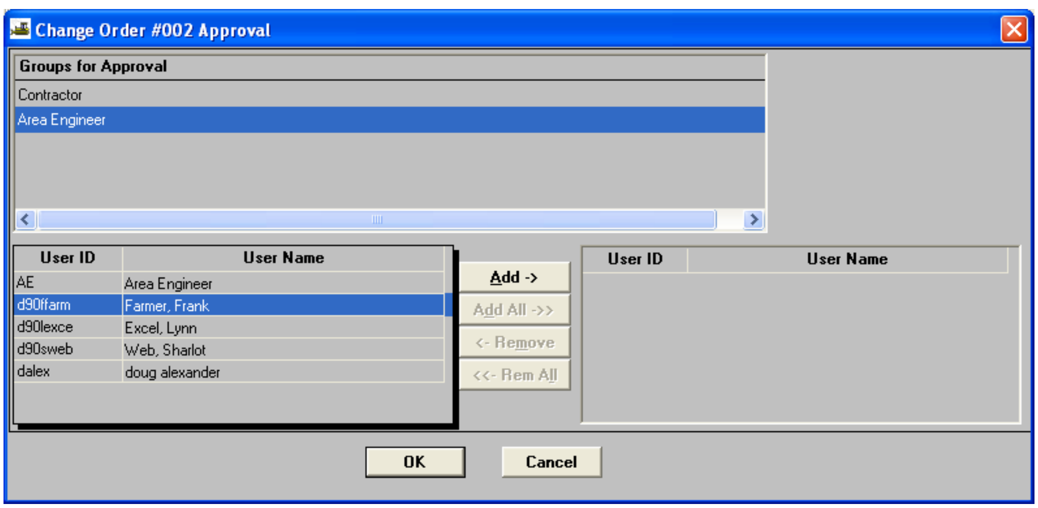
"Click" on Yes.

The **Change Order Approval: Groups for Approval** window will open.



"Click" on the appropriate **User Id** for <u>each</u> **Groups for Approval**.
"Click" on the **Add** button, then select **Groups for Approval: Area Engineer**
Repeat until all **Groups for Approval** have an approver associated.

NOTE: You will want to pick yourself as the Contractor and LPA, if appropriate, until the contactors and LPAs come online with SiteManager. Once the Contractor signs the Change Order you will have to log on as the Contractor using your own User ID and password to approve the Change Order before it will go to the next level of approval. Once the LPA signs the Change Order you will have to log on as LPA using your own User ID and password to approve the Change Order before it will go to the next level of approval.



"Select" the appropriate **Area Engineer** then "Click" on **Add.**
After all **Groups for Approval** have been selected, "click" on OK.

This message will appear after the SiteManager e-mail is sent to the first **User ID** that needs to approve this Change Order. "Click" on **OK**.

Approving or Denying a Change Order

This section will explain how to approve or deny a change order.
NOTE: If a change order is denied the creator can change it back to draft and make changes or if the change order is no longer needed the creator can delete the change order

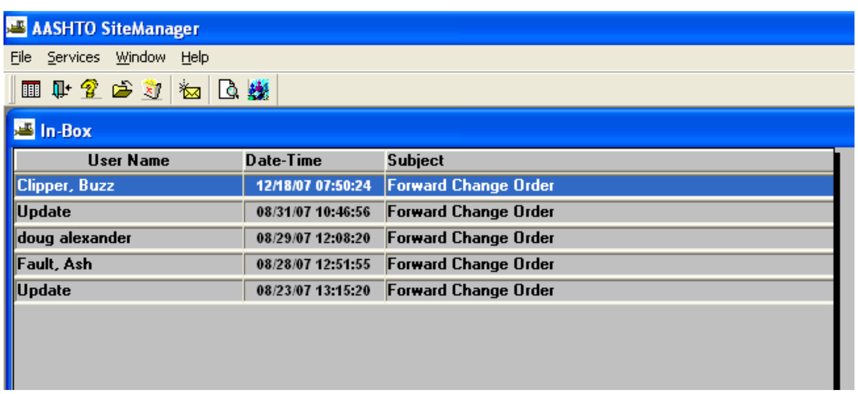
The Contractor and Local Public Agency (LPA) will sign the printed change order document when they approve it. After the PE/S received the signed document, the PE/S will enter the approval status of the change order into SiteManager. The approval sequence that the PE/s will enter into SiteManager is in this order:

1. Contractor
2. LPA

If additional users are required to approve the change order, then SiteManager will automatically process the change order to the next approver (i.e. AE, DCE…).

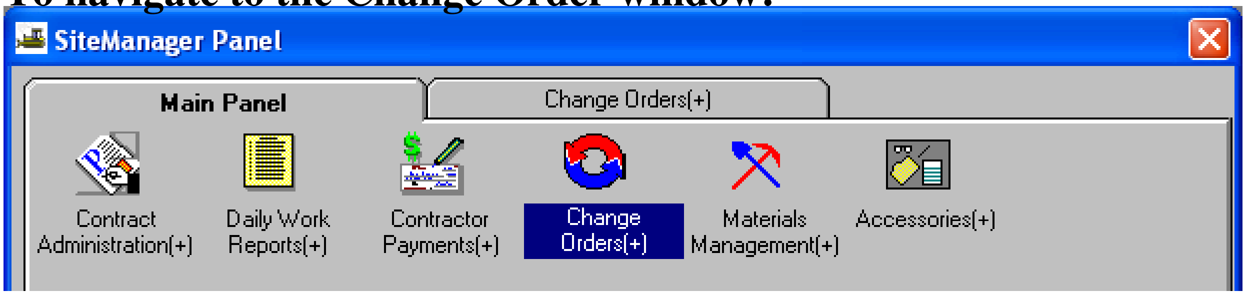
NOTE: Each PE/S will have a Contractor and a LPA user group associated to them. Log into the appropriate User Group corresponding with the required approval level using your own User ID and password.

For this exercise log into SiteManager as Contractor: txxphann, password: pass

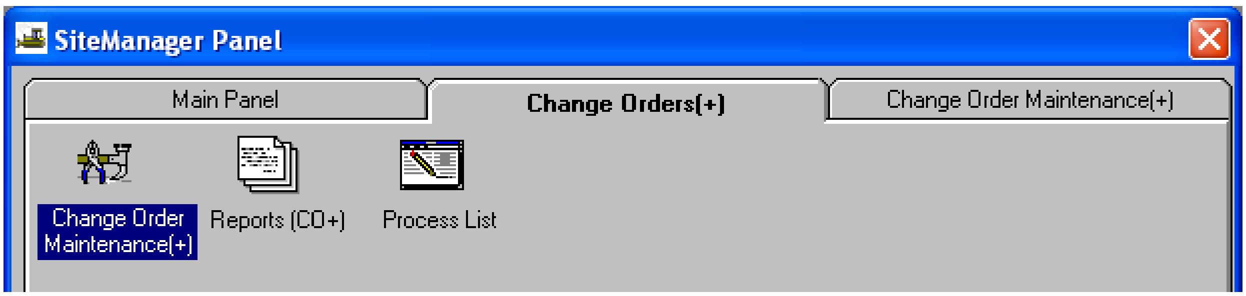


This message will be sent to your In-Box when the change order can be approved or rejected. Refer to module **G-1: SiteManager INBOX** for viewing the message.

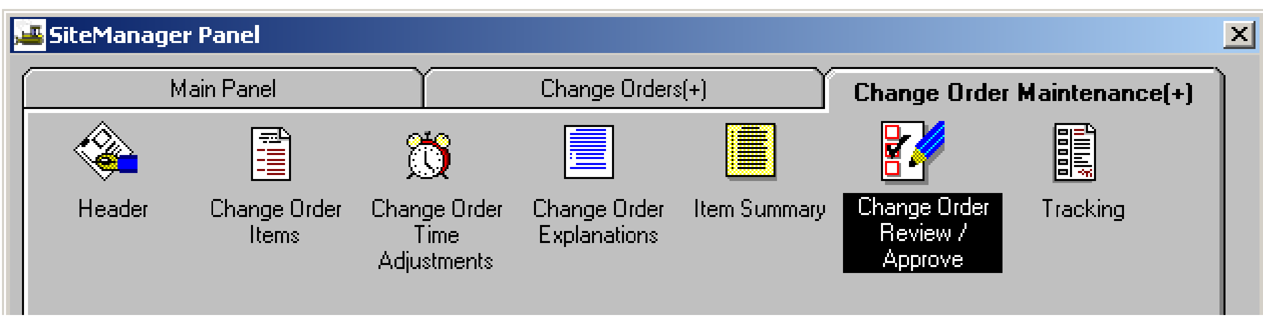
To navigate to the Change Order window:



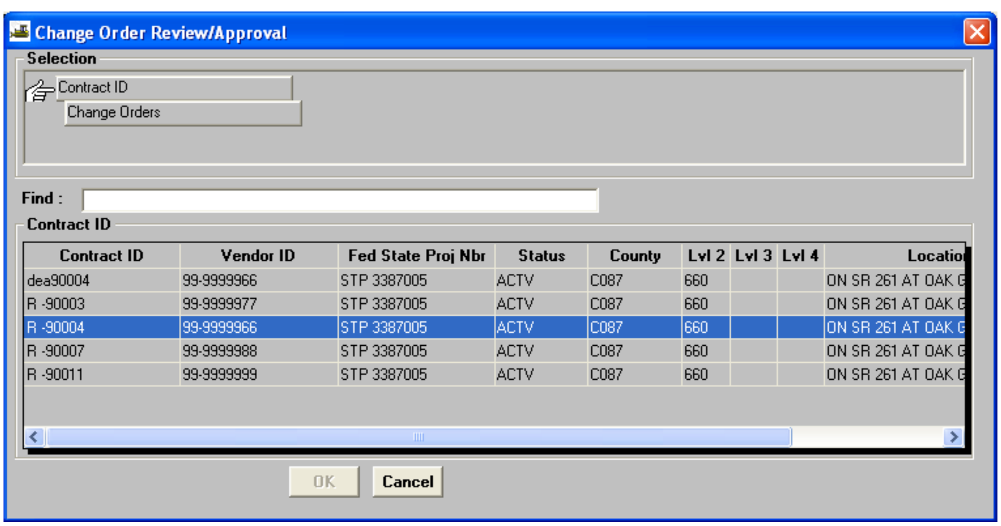
“Double-Click” on **Change Orders(+)**.



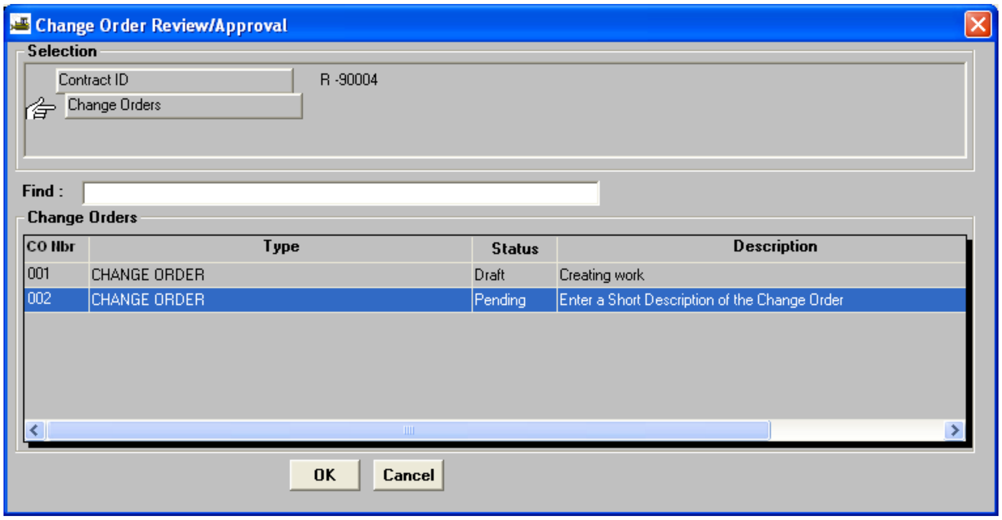
“Double-click” on **Change Order Maintenance(+)**.



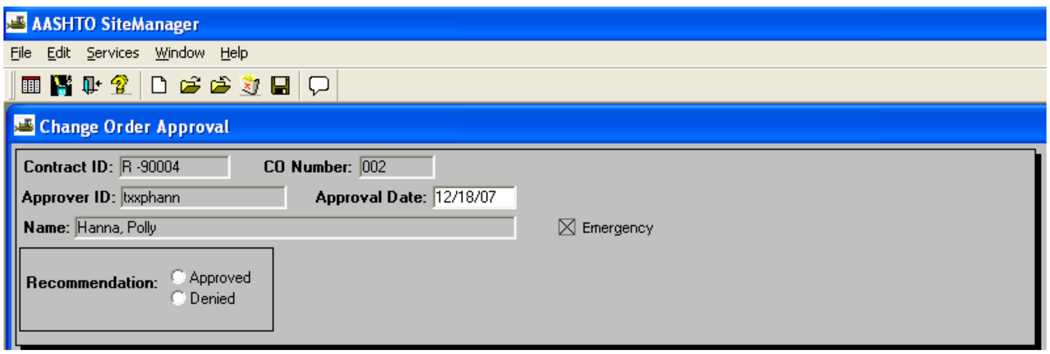
“Double-click” on **Change Order Review/Approve**.



“Double-click” on the appropriate **Contract ID**.



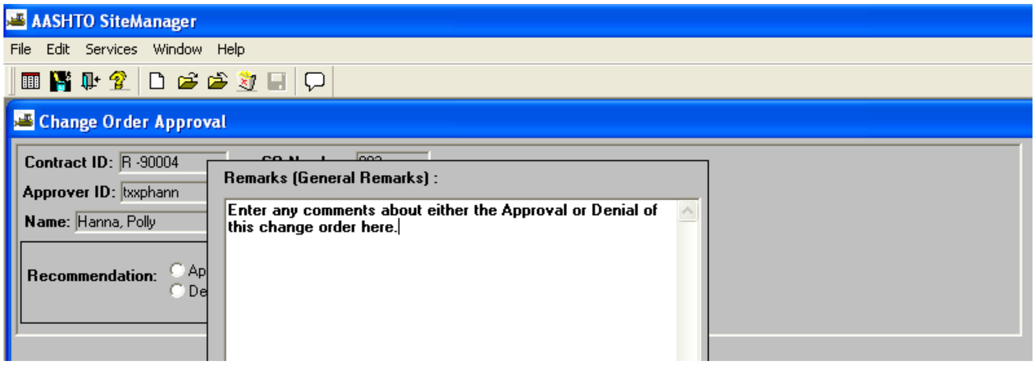
"Double-click" on the appropriate **CO Nbr**.



The **Change Order Approval** window opens showing the following information:

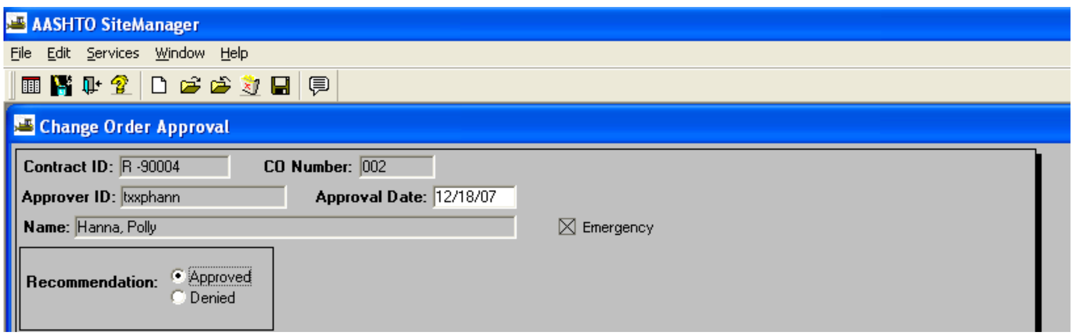
- **Contract ID**: The **Contract ID** is the unique identifier for the contract and is automatically populated.
- **CO Number**: The **CO Number** is the unique identifier for the Change Order and is automatically populated.
- **Approver ID**: The **Approver ID** is the SiteManager user name of the individual who is approving the Change Order.
- **Approval Date:** The **Approval Date** field is automatically populated with the current date.
- **Name**: The **Name** field is the user associated to the **Approver ID**.
- **Emergency**: This field is checked when the Change Order involves work needing quick approval.
- **Recommendation**: This field is populated with either **Approved** or **Denied**.

Comments about the change order can be made by “Clicking” on the **Remarks** button located on the toolbar.

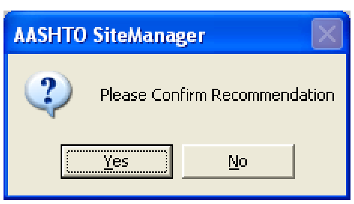


“Enter” the comments in the **Remarks** field.

Close this box by “clicking” on the **Remarks** button again.
Notice that the **Remarks** balloon button now has lines in it showing comments are located there.



“Click” on the appropriate button for either **Approved** or **Denied**.
“Click” on the **Save** button located on the toolbar.



“Click” the appropriate response to this message.

“Click” on the **OK** button. The next User in the approval cycle for the change order will receive a SiteManager Inbox message indicating they have a change order for approval.

“Click” on the **Close** button located on the toolbar.

Creating a Overrun/Underrun and Extra Work Change Order

Exercise E-1-0

Group Exercise

Log into SiteManager as: d90bclip
Enter password: pass
Log in as**:** **PE/S**
Navigate from the **Main Panel**:
"Double-Click" on **Change Orders (+)** icon
"Double-Click" on **Change Order Maintenance (+)** icon
"Double-Click" on **Header** icon
"Click" on **Services** located on the Toolbar
"Click" on **Choose** Keys
"Double-Click" on appropriate **Contract ID:** R90007
Enter **Description**: Removal of unsuitable material in commercial driveway
Select **Reason Code**: CONSTRUCTABILITY, Soils Related
Select **CO Type**: CHANGE ORDER
Select **Functions:** Overrun/Underrun
"Click" on the **Generic Fields** button on the toolbar
"Enter" today's date.
"Click" on the dropdown arrow and select Non-Discretionary.
"Click" on the **Generic Fields** button to close
"Click" on **Save** located on the Toolbar
"Click" on **Services** located on the toolbar, then "Click" on CO Items.
"Click" on the **Services** locate on the toolbar.
"Click" on Select Existing Item for CO
"Double-click" on **Project Item Number** 0002 for **Project Nbr** 962071 Field Office, B
"Enter" the quantity of 1 in the **Quantity** field.
"Click" on **Save** located on the Toolbar.
"Click" on **Services** located on the toolbar, then "Click" on Change Order Explanations**.**
"Enter" an explanation for this change order.
"Click" on **Save** located on the Toolbar
"Click" the **Close** button on the toolbar to return to the **Change Order Items** window.
"Click" the **Close** button on the toolbar to return to the **Header**
"Click" on **Services** located on the Toolbar, then "Click" on **Calculate Change Order.**
Change **Status** to Pending.
"Click" on **Save** located on the Toolbar
"Add" the **User ID's** for Contractor for Approval.
"Add" the **User ID's** for Area Engineer for Approval
"Click" on **Save** located on the Toolbar
"Click" on **Close** located on the Toolbar

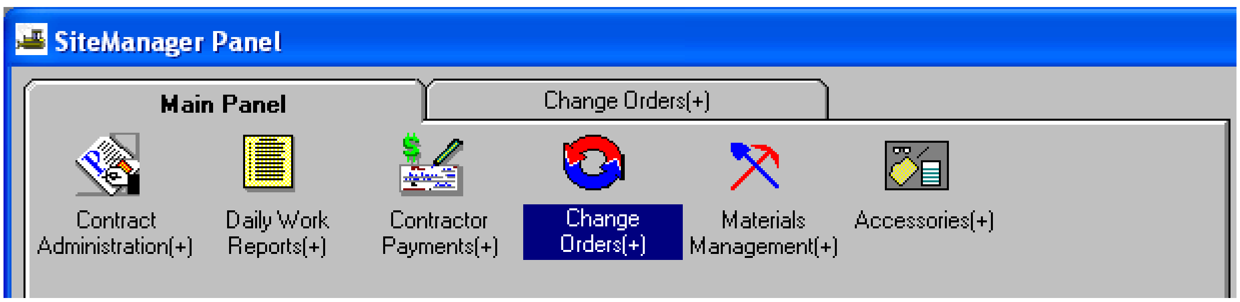
CHANGE ORDER for TIME ADJUSTMENTS

This section will explain how to add time adjustments to a contract or milestone through a change order.

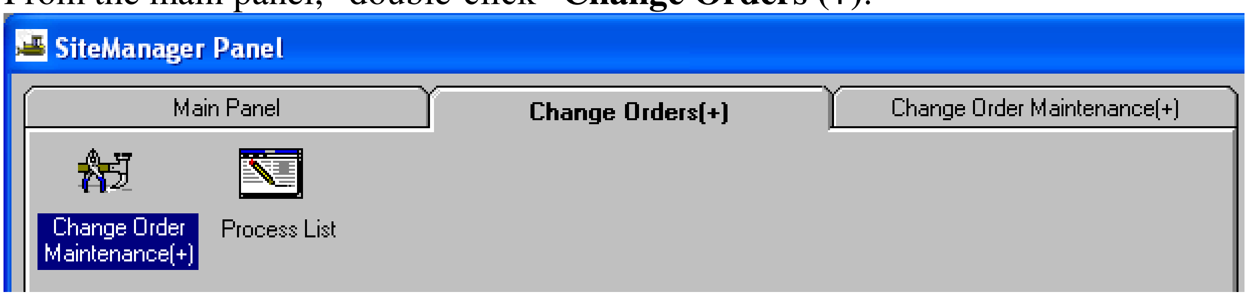
NOTE: A header must be created and the Time Adjustment Function check-box, located in the header, must be checked.

There are three types of time adjustments:

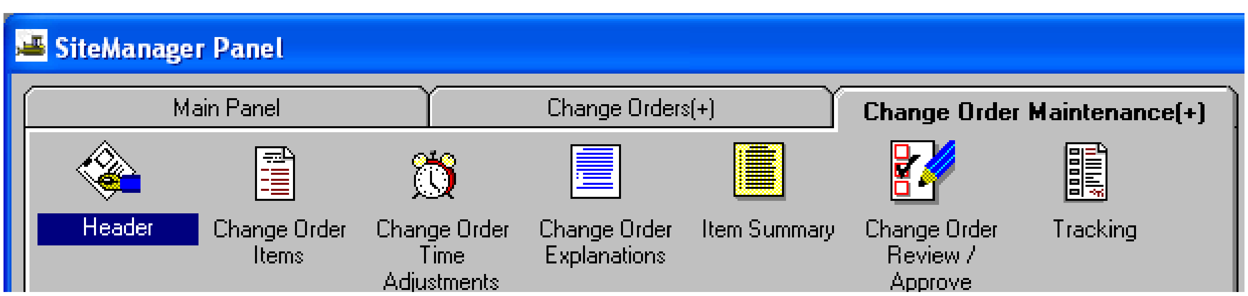
- Change in the Contract Completion Date-available only for Contracts with a Fixed Completion Date.
- Change in the number of days associated with a Contract-available for Contracts with a Work Day or Calendar Day completion.
- Change in the number of days associated with a Milestone-available for Contracts with a Work Days, Calendar Day, or Fixed Completion Date.



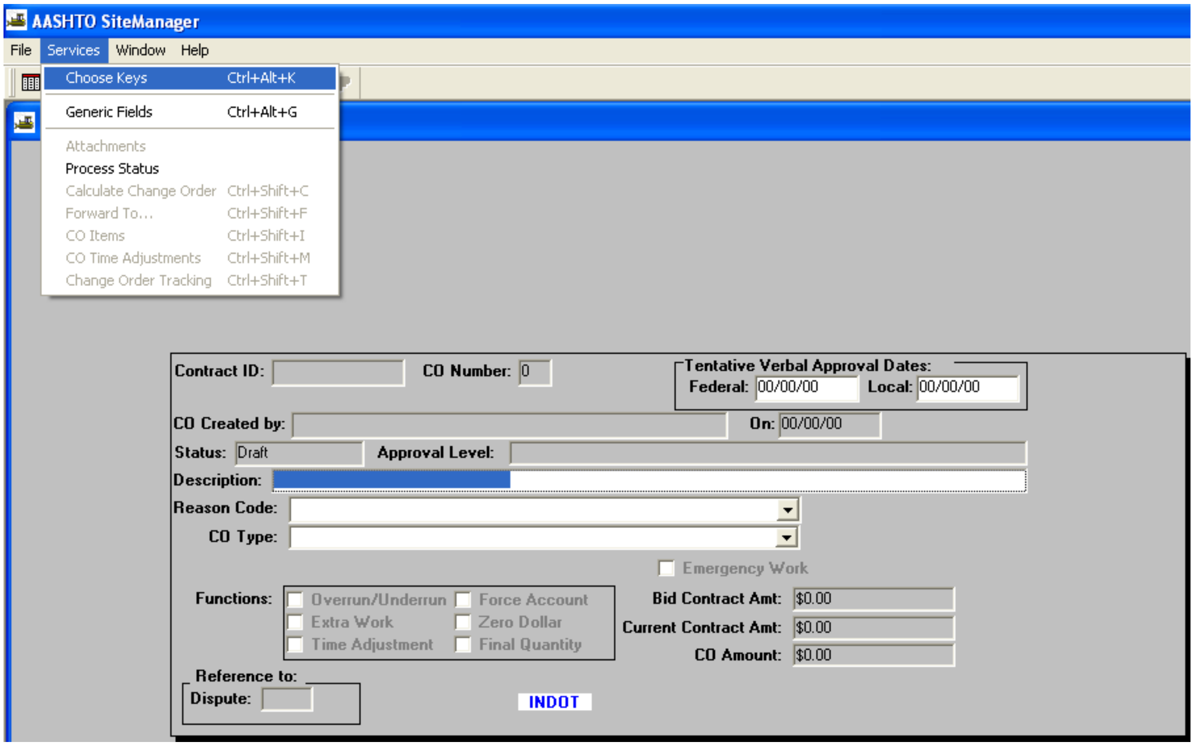
From the main panel, "double-click" **Change Orders (+)**.



"Double-click" **Change Order Maintenance (+).**



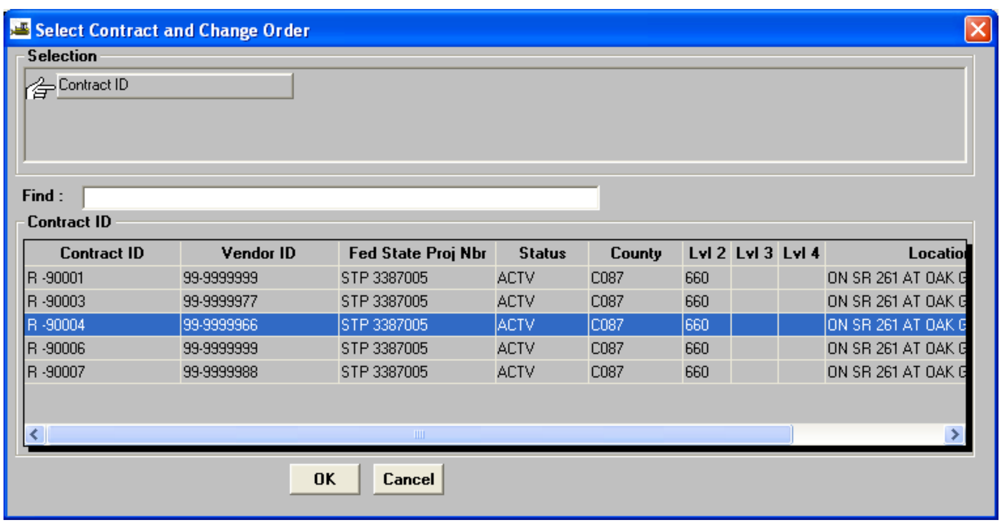
"Double-click" on **Header.**



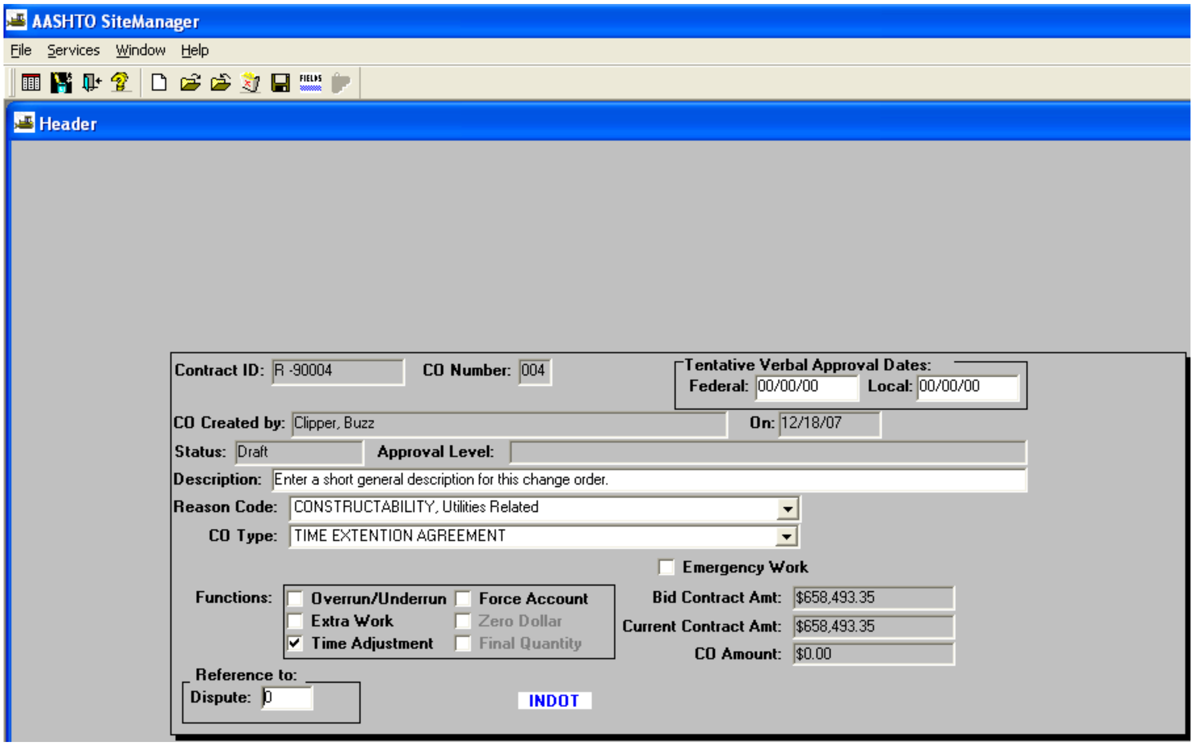
The **Header** window will open up.

"Click" on **Services** located on the toolbar.

"Click" on **Choose Keys**.



"Double-click" on the appropriate **Contact ID**.



Description: “Enter” a short general description for the entire change order.

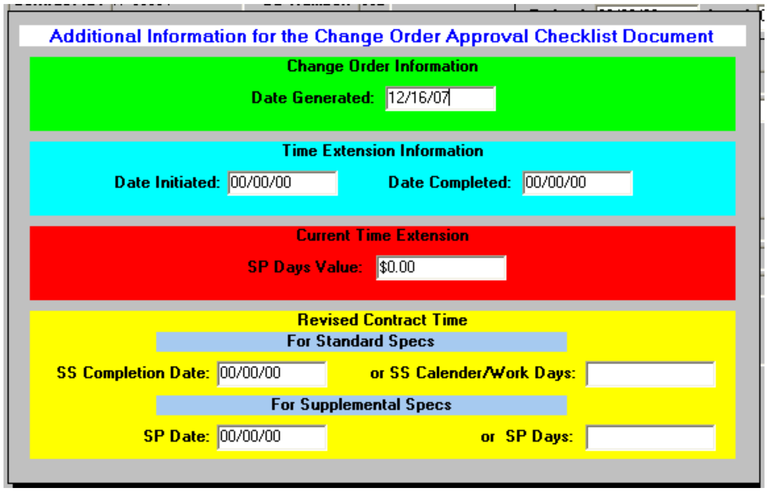
Reason Code: “Click” on the appropriate **Reason Code** for the entire order.

CO Type: “Click” on the appropriate **CO Type**.

“Click” on **Functions: Time Adjustment**

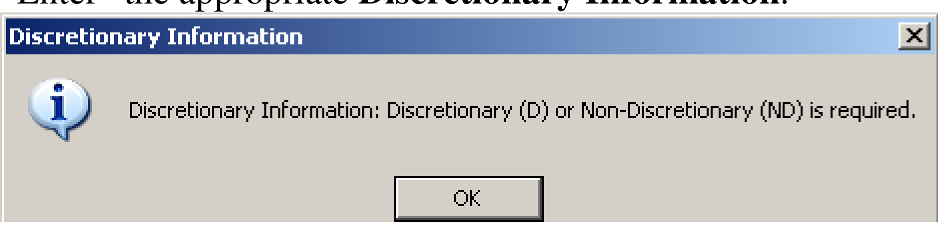
If this change order is referenced to a Dispute or Claim, “Right-click” on the **Dispute** Field and select the appropriate **Dispute/Claim**.

“Click” on the Generic Field located on the toolbar.



Additional Information for the Change Order Approval Checklist Document opens up. “Enter” the appropriate information for the Change Order.

Discretionary Information field is required to be filled in and will not allow the Change Order to be completed without it.
“Enter” the appropriate **Discretionary Information**.



This message will appear when the CO is changed to pending if the information is not entered.

To close “Click” on the Generic Field located on the toolbar.

“Click” the **Save** button located on the toolbar.

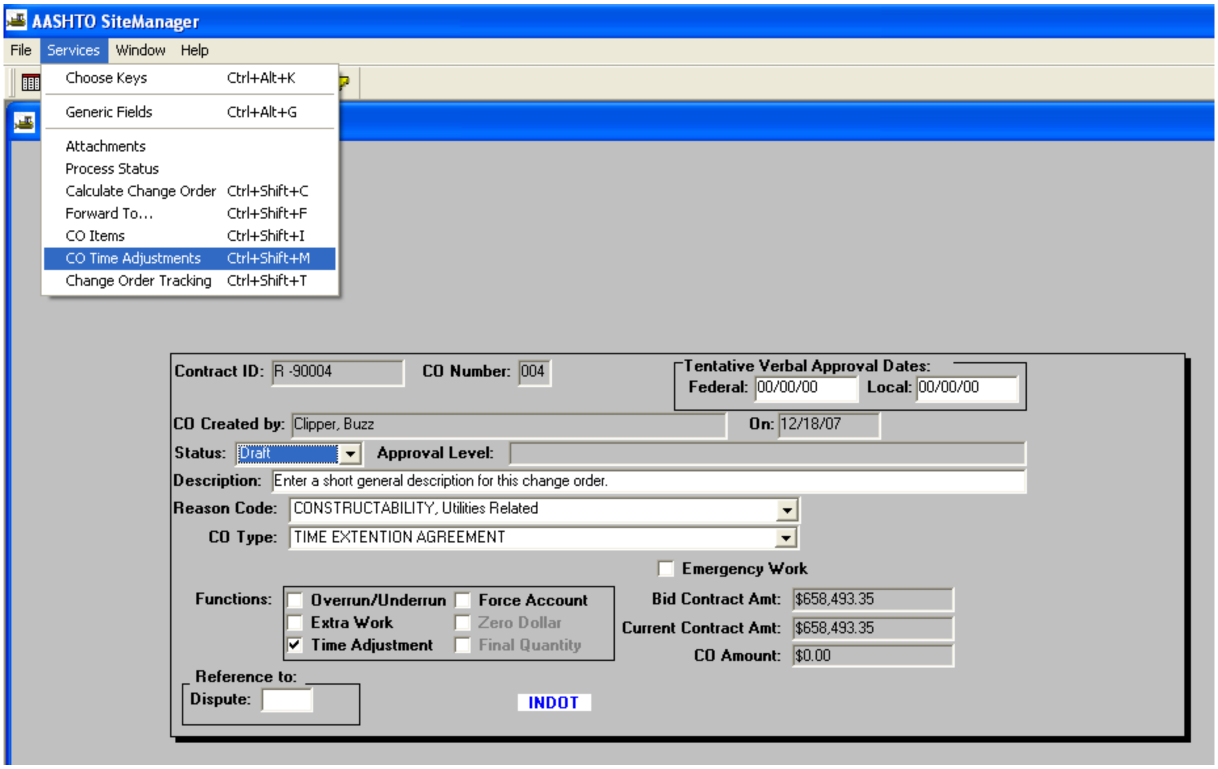
Attachments

The Attachment icon will appear without a paperclip if there are no attachments associated with the record in the currently opened window.

The Attachment icon will appear with a paperclip if attachments are associated with the record in the currently opened window.

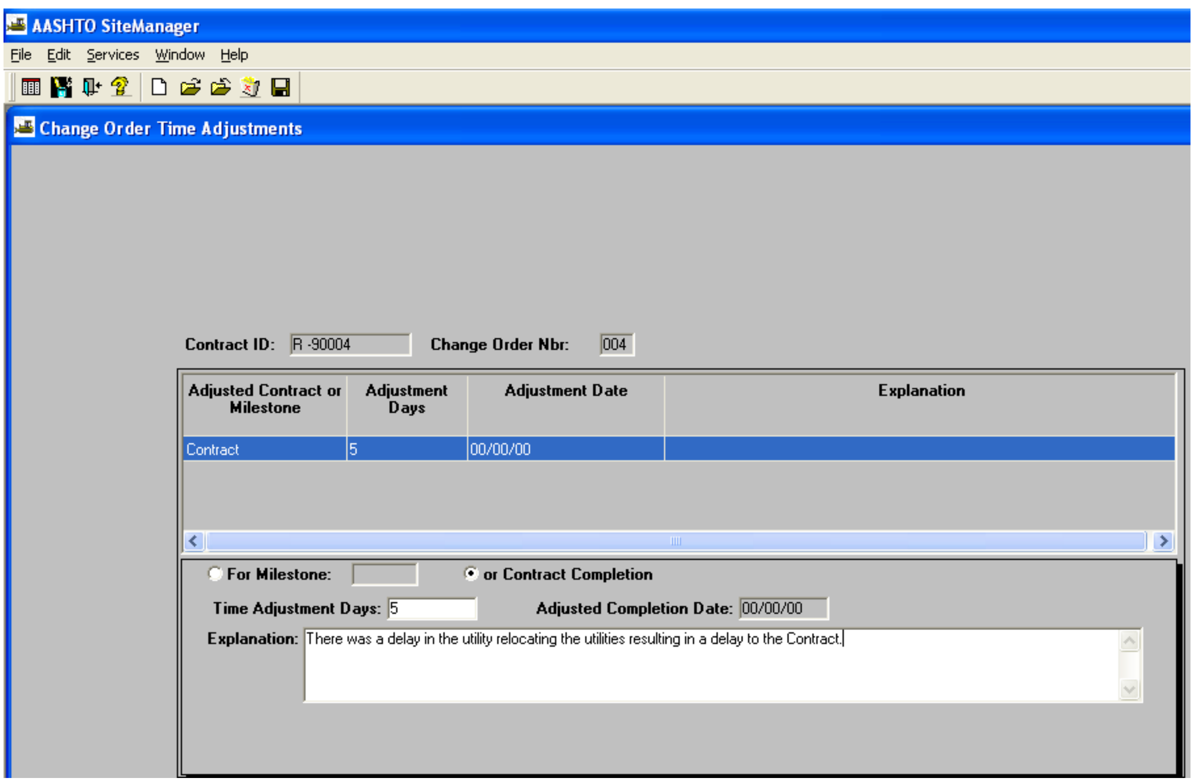
To create an attachment see training document **A-2-11-1 Attaching a Document**

“Click” on Save located on the toolbar.

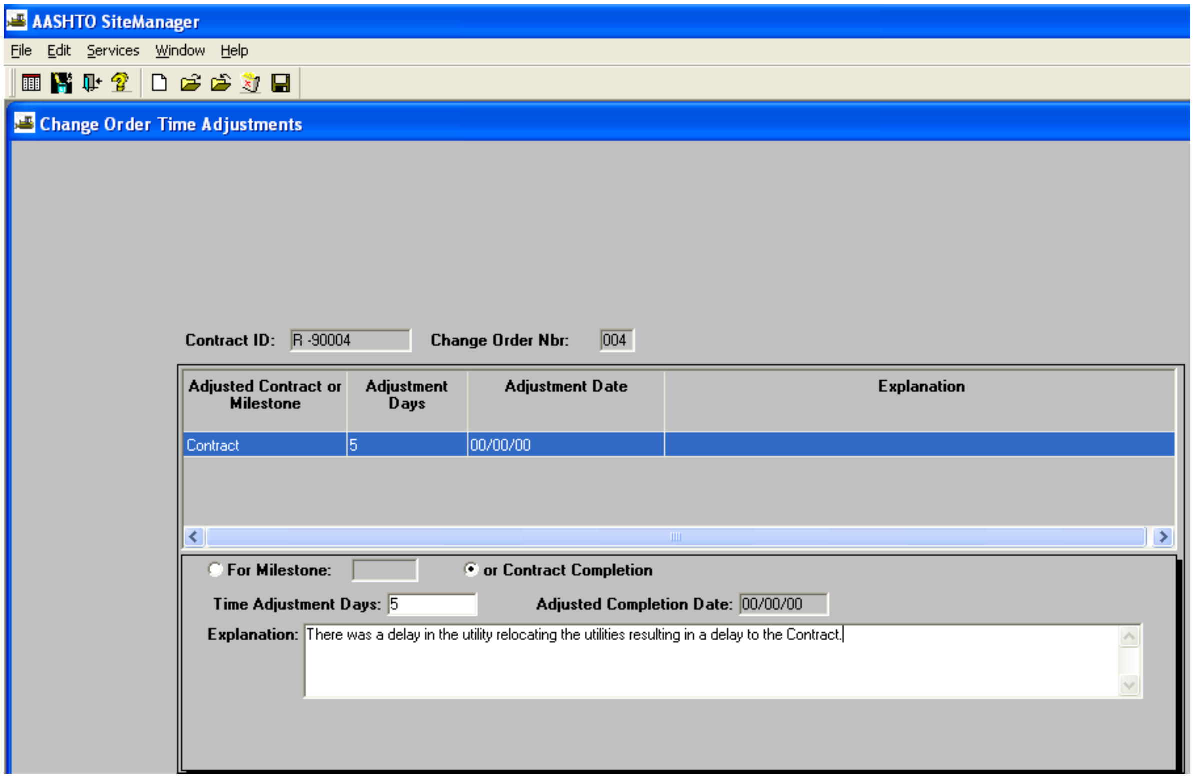


“Click” on **Services** located on the toolbar.

“Click” on **CO Time Adjustments** located on the toolbar.



The **Change Order Time Adjustment** window opens up. By default the window opens up with the radio button selected for **Contract Completion,** if this is for **Milestones** select the **Milestone** radio button.



Time Adjustment Days: Enter the appropriate number of days for this **Time Adjustment.**

Explanation: Enter any remarks for this **Time Adjustment** in the **Explanation** field.

"Click" on **Save** located on the toolbar.

If an additional Time Adjustment is required for the **Milestone,** "click" on the New button located on the toolbar and enter the required information for the **Milestone**.

Then "click" on **Save** located on the toolbar.

After all of the **Time Adjustments** are added to this change order "click" on the Save button located on the toolbar, then follow the steps for adding **Change Order Explanations**, **Forwarding for Review**, and **Fowarding the Change Order for Approval** starting on Page 26 of this document.

Change Order Time Adjustments

Exercise E-1-1 Group Exercise

This exercise will demonstrate how to prepare a Contract Time Adjustment for a Change Order.

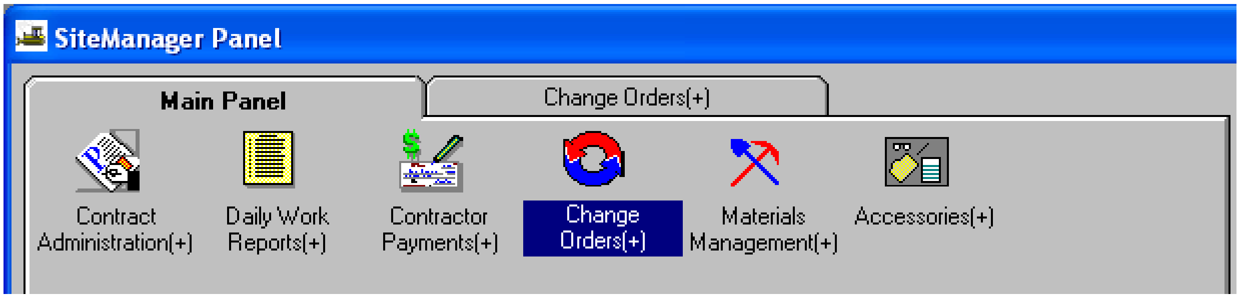
Log into SiteManager as: d90afaul
Password: pass
Log in as: **PE/S**

Navigate from the **Main Panel**:
"Double-Click" on **Change Order (+)** icon
"Double-Click" on **Change Order Maintenance (+)** icon
"Double-Click" on **Header**.
"Click" on **Services** on the toolbar to "double-click" **Contract ID**: R-90004
"Type" in the **Description** "Adding time to the contract"
"Select" on the **Reason Code**: CONSTRUCTABILITY, Staging Related
"Select" the **CO Type**: **TIME EXTENTION AGREEMENT**
"Click" on the **Function** checkbox for Time Adjustment
""Click" on the **Generic Fields** button on the toolbar
"Enter" today's date
"Click" on the dropdown arrow and select Non-Discretionary.
"Click" on the **Generic Fields** button to close
"Click" the **Save** button on the toolbar
"Click" on **Services** on the toolbar then "click" on CO Time Adjustments
Enter Explanation: "Contract time adjustment due to Utility Work delay"
Enter **Time Adjustment Days**: "10"
"Click" on **Save** located on the Toolbar
"Click" on **Close** located on the Toolbar to exit the Time Adjustment window & return to Header
Change **Status** to Pending.
"Click" on **Save** located on the Toolbar
"Add" the **User ID's** for Contractor for Approval.
"Add" the **User ID's** for Area Engineer for Approval
"Click" on **Save** located on the Toolbar
"Click" on **Close** located on the Toolbar to return to the header
"Click" on **Close** located on the Toolbar to exit the Header window

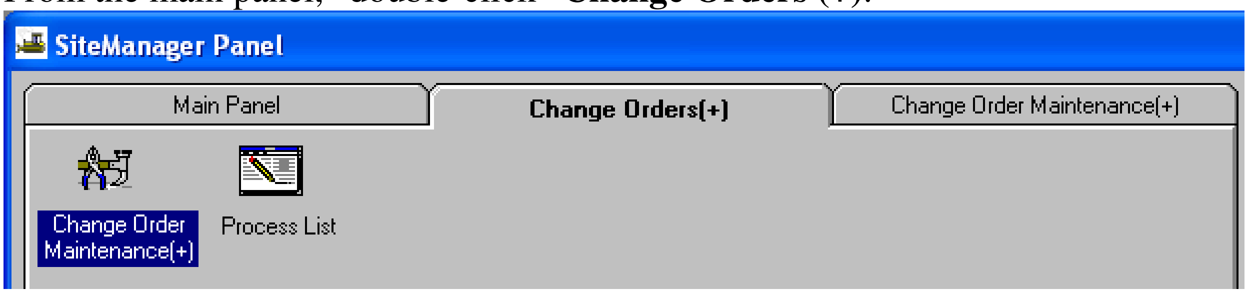
ZERO DOLLAR CHANGE ORDER

This section will explain how to create a Zero Dollar Change Order.

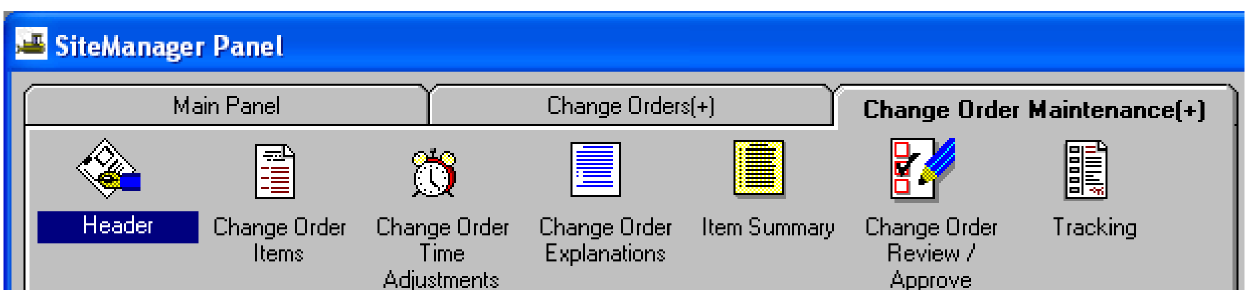
NOTE: A header must be created and the Zero Dollar check-box, located in the header, must be checked.



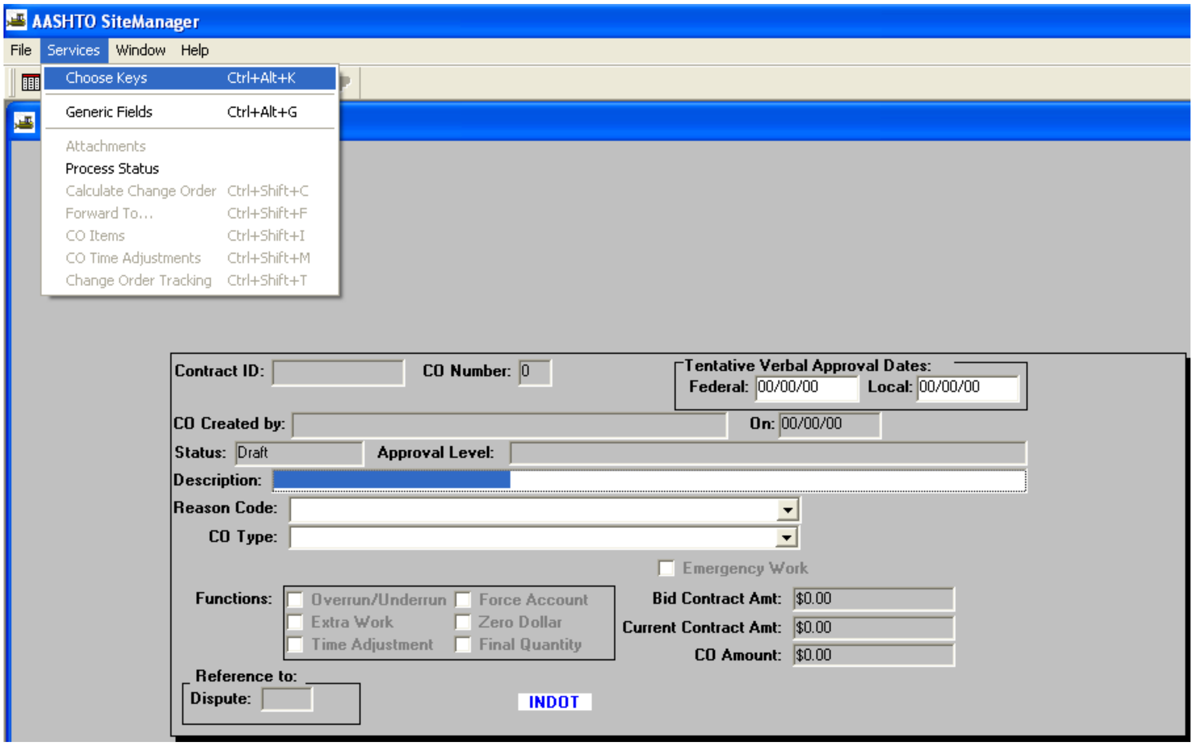
From the main panel, "double-click" **Change Orders (+)**.



"Double-click" **Change Order Maintenance (+).**



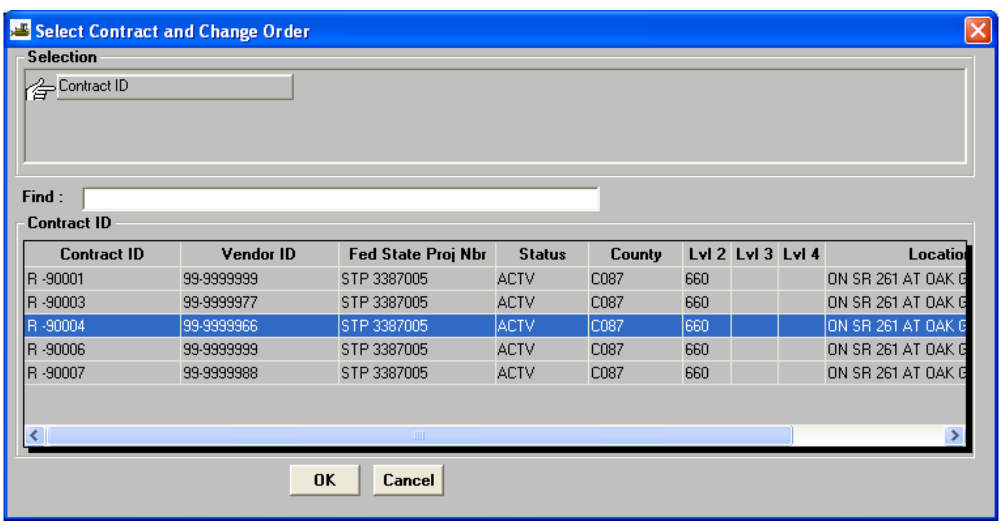
"Double-click" on **Header.**

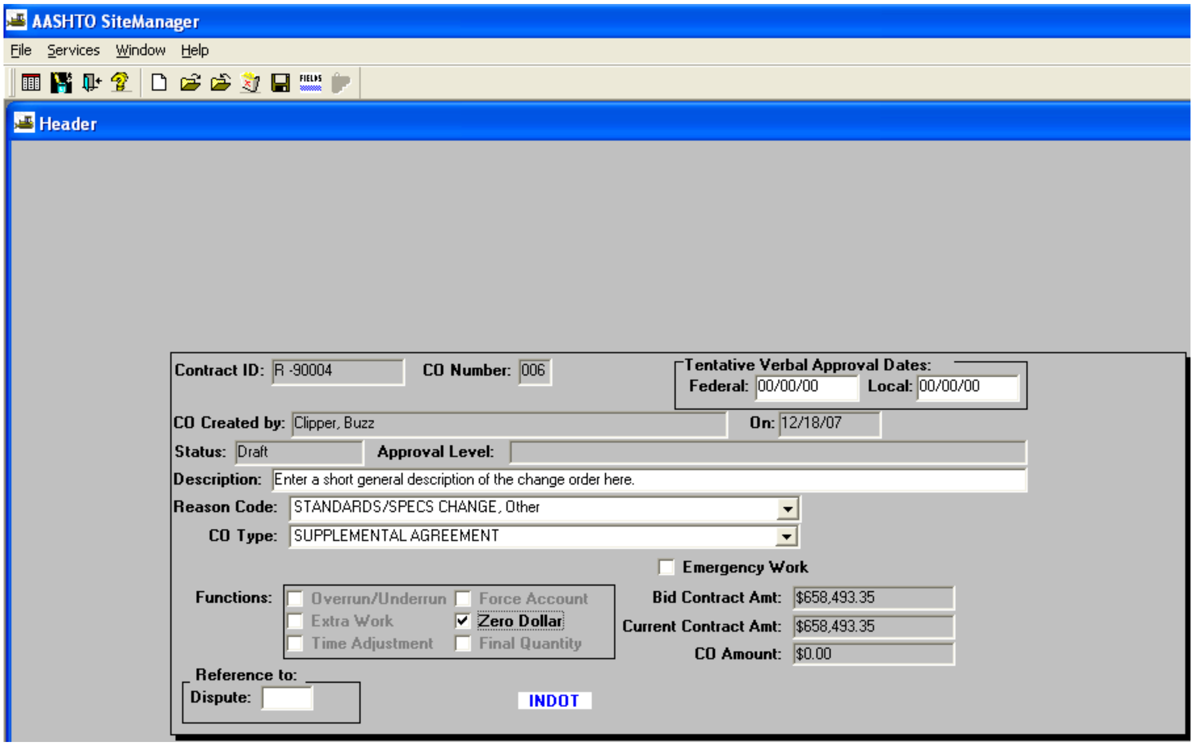


The **Header** window will open up.

“Click” on **Services** located on the toolbar.

“Click” on **Choose Keys**.





Description: “Enter” a short general description for the entire change order.

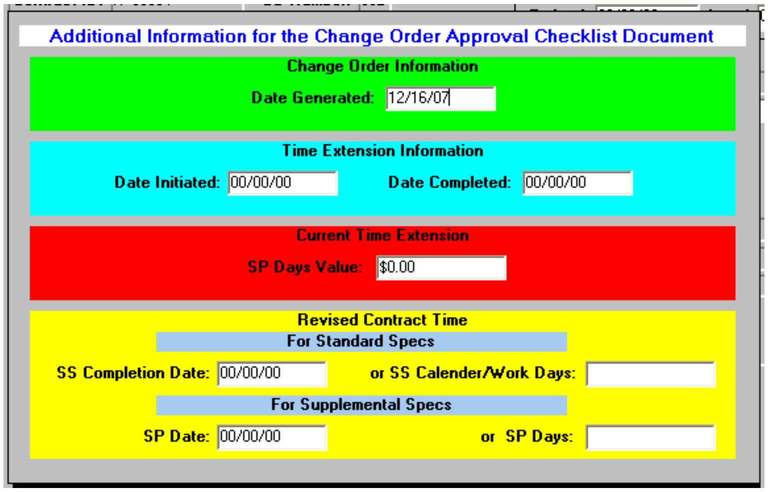
Reason Code: “Click” on the appropriate **Reason Code** for the entire order.

CO Type: “Click” on the appropriate **CO Type**.

“Click” on **Functions: Zero Dollar**

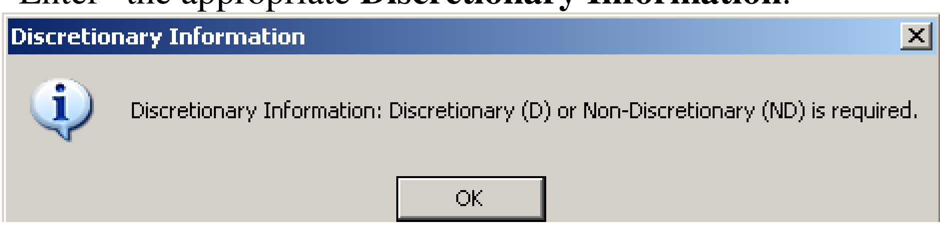
If this change order is referenced to a Dispute or Claim, “Right-click” on the **Dispute** Field and select the appropriate **Dispute/Claim**.

"Click" on the Generic Field  located on the toolbar.



Additional Information for the Change Order Approval Checklist Document opens up. "Enter" the appropriate **Date Generated** for the Change Order.

Discretionary Information field is required to be filled in and will not allow the Change Order to be completed without it.
"Enter" the appropriate **Discretionary Information**.



This message will appear when the CO is changed to pending if the information is not entered.

To close "Click" on the Generic Field  located on the toolbar.

"Click" the **Save**  button located on the toolbar.

"Click" on the **Close**  button located on the toolbar.

Follow the steps for adding **Change Order Explanations**, **Forwarding for Review**, and **Fowarding the Change Order for Approval** starting on Page 23 of this document.

Attachments

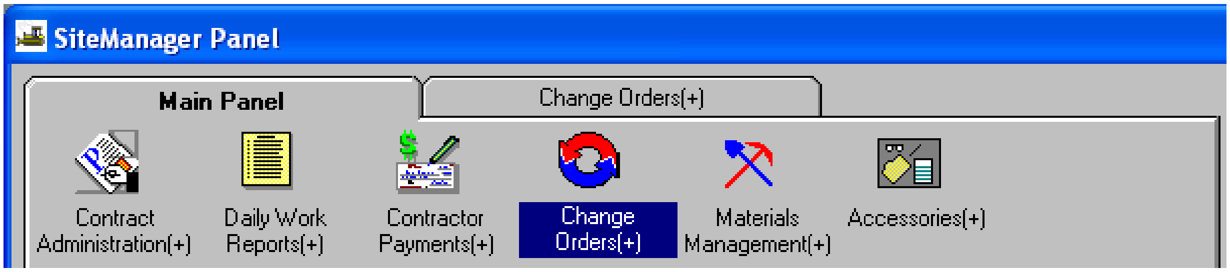
 The Attachment icon will appear without a paperclip if there are no attachments associated with the record in the currently opened window.

 The Attachment icon will appear with a paperclip if attachments are associated with the record in the currently opened window.

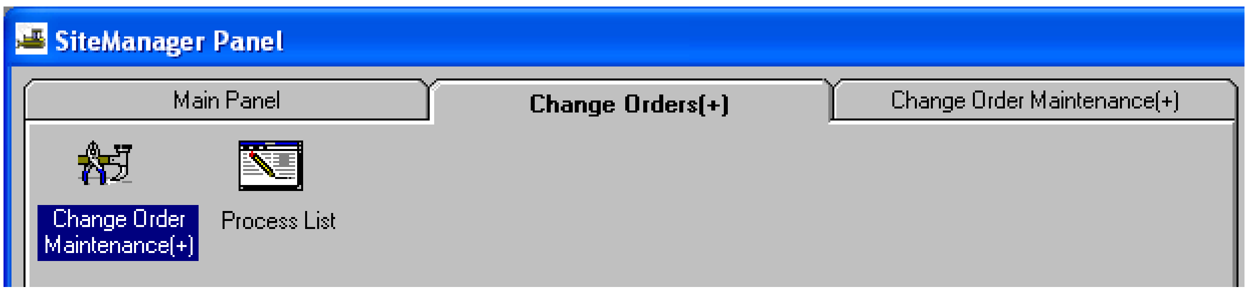
To create an attachment see training document **A-2-11-1 Attaching a Document**

Viewing the Item Summary

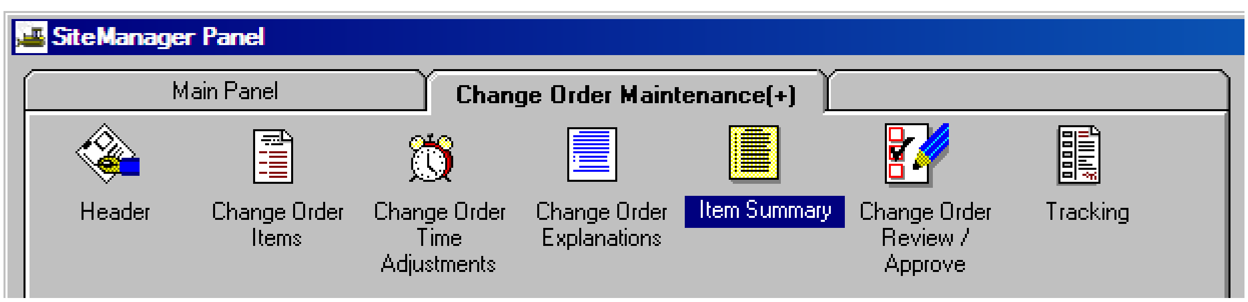
This section will explain how to view the details of the Items in Change Orders in any status (Draft, Pending, or Approved).



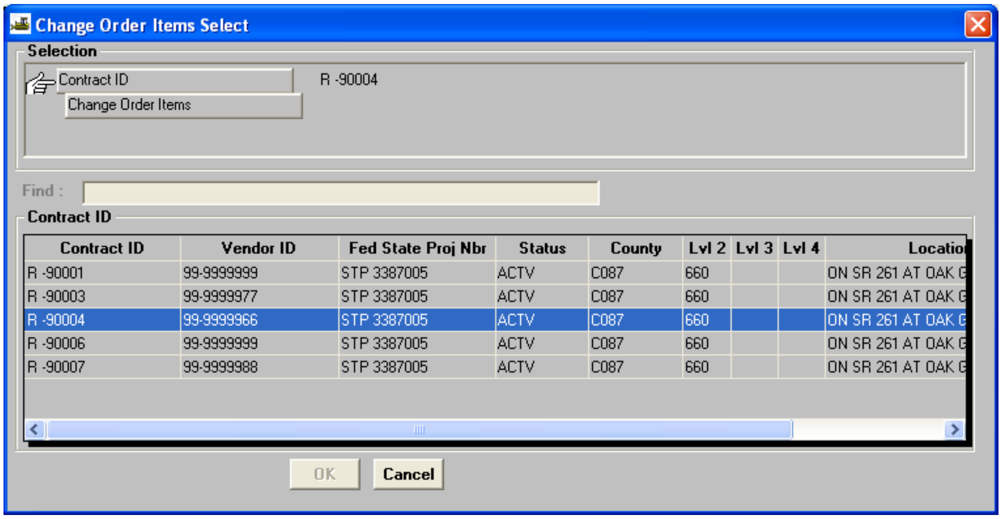
From the Main Panel, "double-click" **Change Orders (+)**.



"Double-click" **Change Order Maintenance** (+).



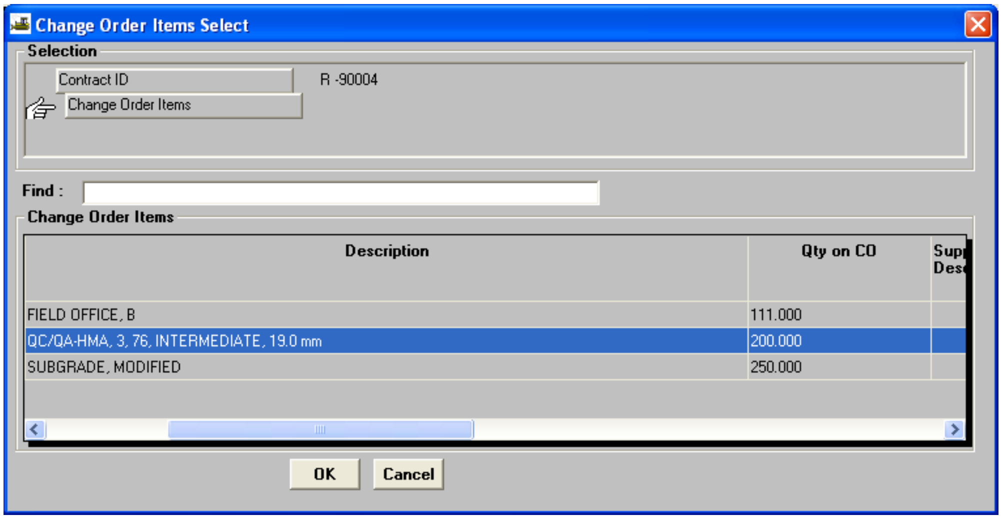
"Double-click" on **Item Summary.**



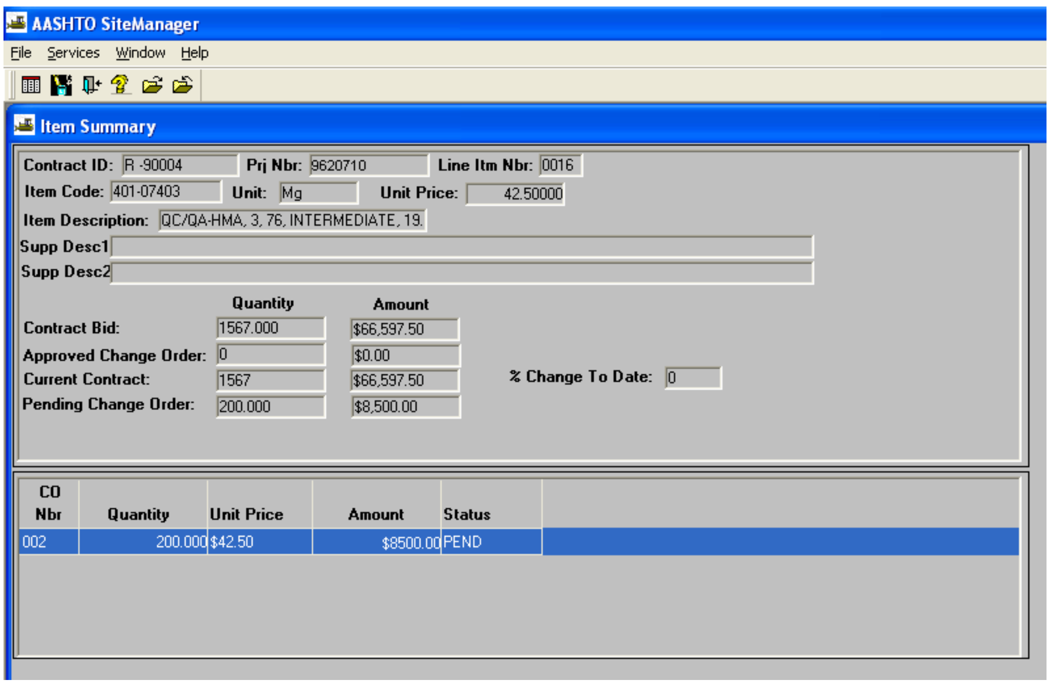
The **Contract and Change Order Selection Panel** will appear with the following information:

- **Contract ID:** the **Contract ID** is the identification number assigned to the contract.
- **Vendor ID:** the **Vendor ID** is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** the **Fed State Proj Nbr** is the assigned Federal or State Project Number.
- **Status:** the **Status** field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** the **County** field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** the **Lvl 2** column indicates the District office administering the contract.
- **Lvl 3:** the **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** the **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the physical limits of the contract.

“Double-click” on the appropriate **Contract ID.**



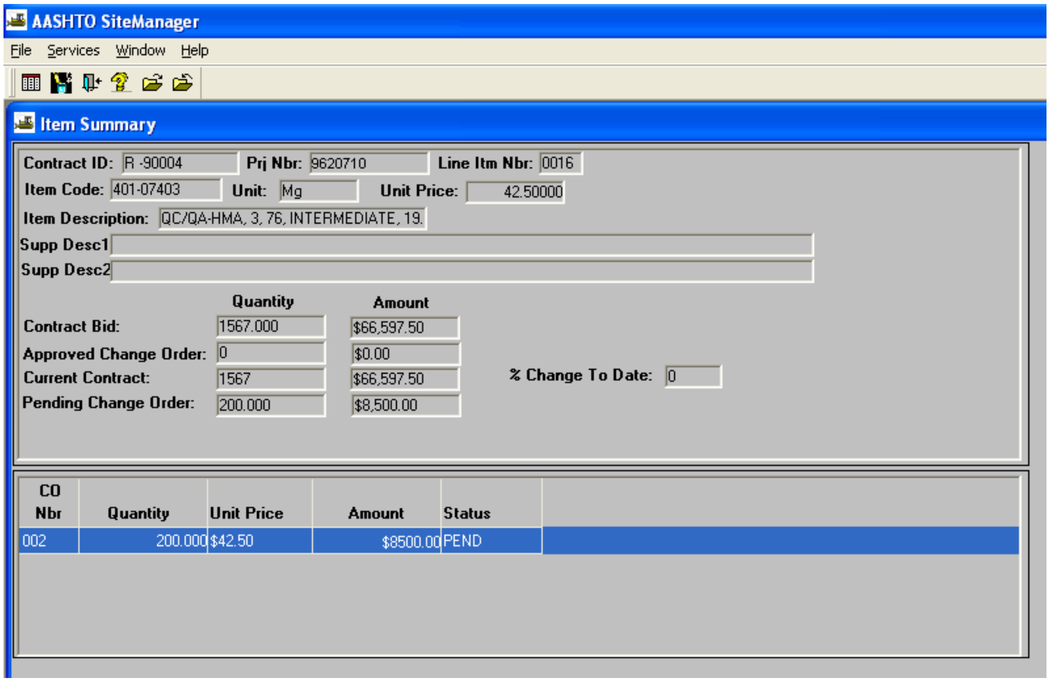
"Double-click" on the appropriate **Item Nbr** to be viewed.



The information associated to the selected item is available to review. This information includes;

- **Contract Bid:** includes only the original contract quantities.
- **Approved Change Order**: includes only the approved CO quantities.
- **Current Contract:** includes only the original contract amount plus the approved change quantities.
- **Pending Change Order**- includes only the Pending CO quantities
- **% Change To Date-** computed using only the Approved CO quantities.

NOTE: the quantities associated to a change order in draft status will not be included in the quantities in the top panel.



The bottom Panel lists the changes made to the work item by individual change order and the value of each change.
Also the status of the changes is noted as well.

“Click” the **Open** button on the toolbar to proceed to another work item.

Or

“Click” on the **Close** button on the toolbar to exit **Item Summary**.

Viewing the Item Summary

Exercise E-5-T Group Exercise

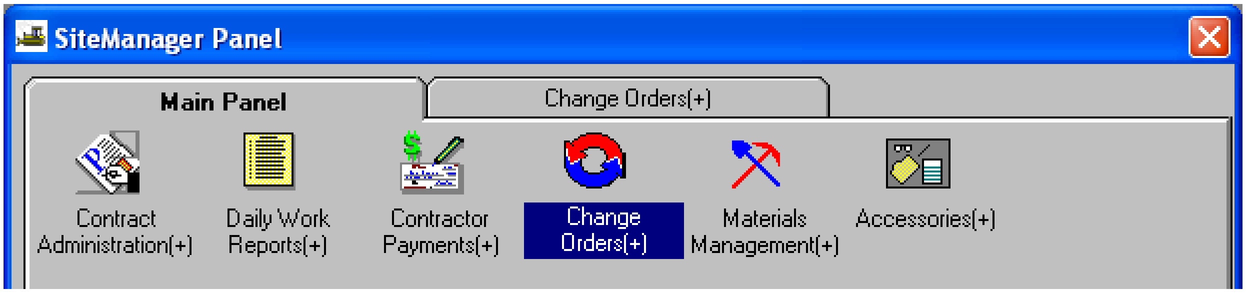
This exercise will demonstrate how to access the information contain in the Change Order Item Summary.

Log into SiteManager as: <u>d90afaul</u>
Password: <u>pass</u>
Log in as: **<u>PE/S</u>**

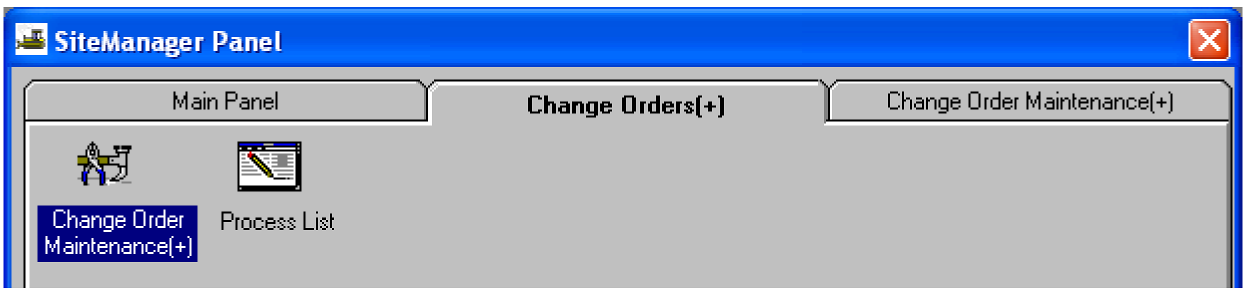
Navigate from the **Main Panel**:
"Double-Click" on **Change Order (+)** icon
"Double-Click" on **Change Order Maintenance (+)** icon
"Double-Click" on **Item Summary** icon
"Double-Click" on appropriate **Contract ID:** <u>R90003</u>
"Double-Click" on appropriate **Item Code:** <u>0007</u>
Review information about that item.
What is the Pending Change Order Amount for this item?_________________
"Click" on **Close** located on the Toolbar.

Tracking a Change Order

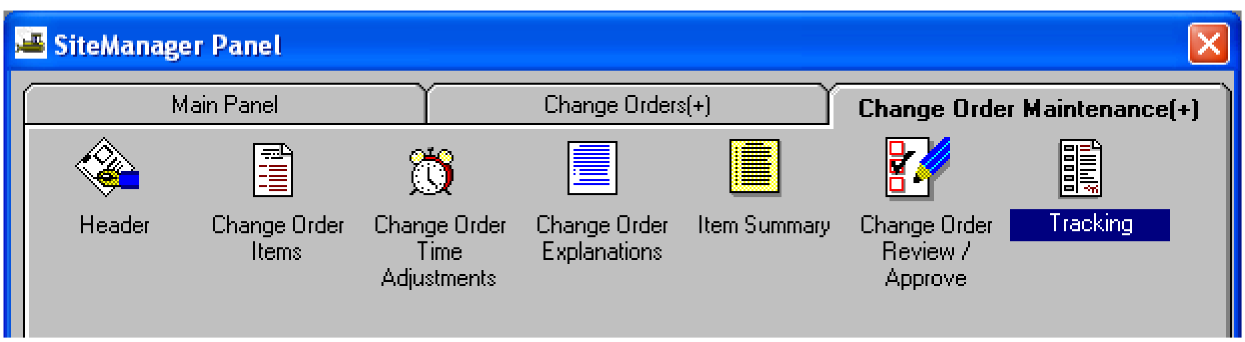
This section will explain how to track the reviewing and approval process of a change order.



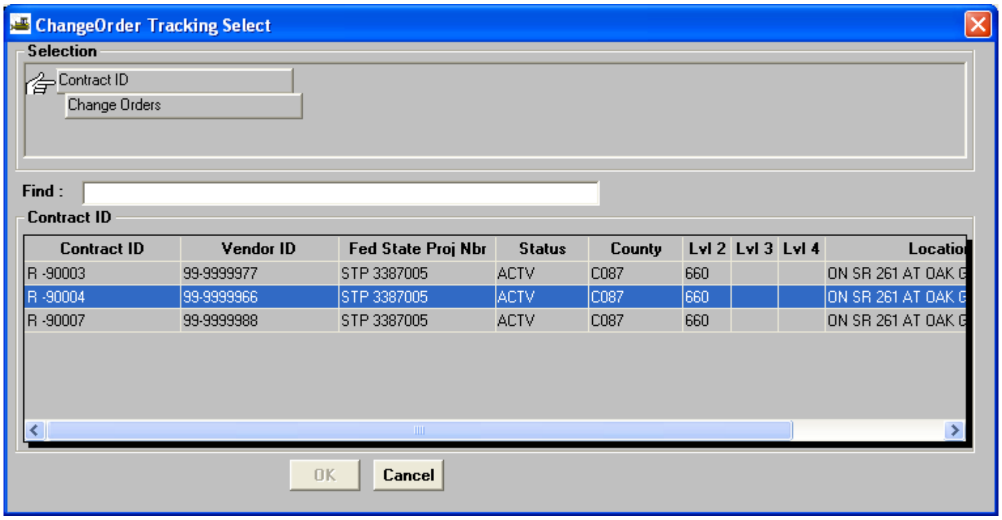
"Double-click" on **Change Orders (+)** located on the Main Panel.



"Double-click" on **Change Order Maintenance (+)**.



"Double-click" on **Tracking**.

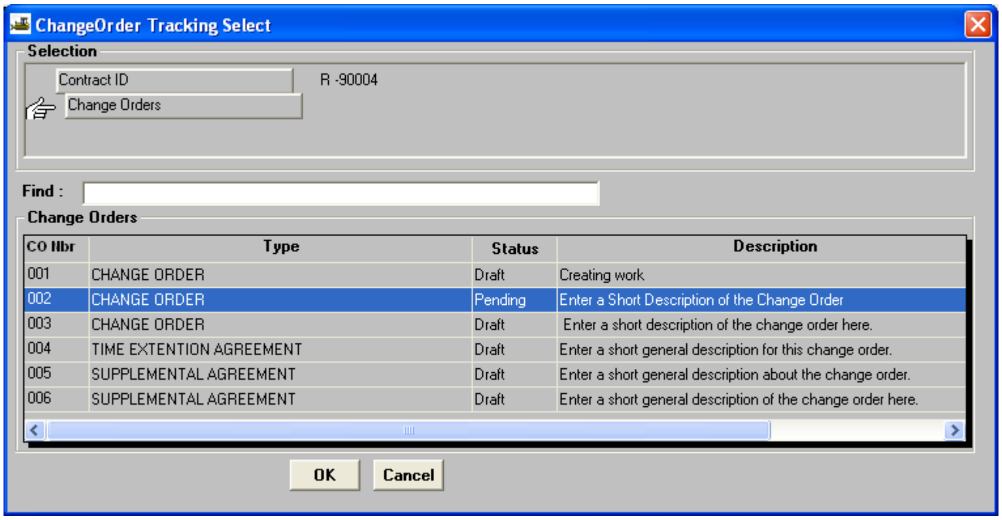


The **Change Order Tracking Select** panel will open with the following information:

- **Contract ID:** the **Contract ID** is the identification number assigned to the contract.
- **Vendor ID:** the **Vendor ID** is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** the **Fed State Proj Nbr** is the assigned Federal or State Project Number.
- **Status:** the **Status** field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** the **County** field identifies the county where the majority of the work is located.
- **Lvl 2:** the **Lvl 2** column identified the District office administering the contract.
- **Lvl 3:** the **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** the **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the physical limits of the contract.

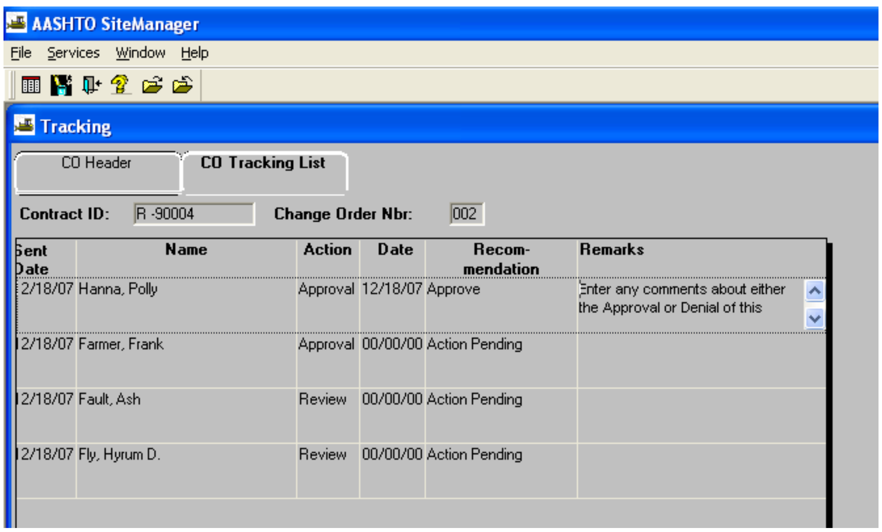
“Double-click” on the appropriate **Contract ID**.

This step will be skipped if a contract is already open.



"Double-click" on the appropriate **Change Order Nbr**.

This step will be skipped if a change order is already open.



"Click" on the **CO Tracking List** tab.

This window will show the **Names** of the reviewers and/or approvers associated to the change order, the **Action** the reviewer took (review or approval), the **Date** the review or approval was made, **Recommendation**, and **Remarks**.

NOTES:

1. If a requested review or approval has not been made, the comment "**Action Pending**" will appear in the **Recommendation** column.
2. Changing from Pending Status to Draft Status will stop the action of a change order. The Change Order is effectively recalled.
3. Changing the Status back to Pending will reinitiate the approval/review process.

"Click" the **Close**  button located on the toolbar.

Tracking a Change Order

Exercise E-9-T Group Exercise

This exercise will demonstrate how to use the Change Order Tracking function.

Log into SiteManager as: d90afaul
Password: pass
Log in as: **PE/S**

Navigate from the **Main Panel**:
"Double-Click" on **Change Orders (+)** icon
"Double-Click" on **Change Order Maintenance (+)** icon
"Double-Click" on **Tracking** icon
"Double-Click" on appropriate **Contract ID:** R90003
"Double-Click" on appropriate **CO Nbr:** 1
Review **CO Header** information
"Click" on **CO Tracking List** tab
Review **CO Tracking List** information
What were Frank Farmer's comments in Review?_____________________________________
"Click" on **Close** located on the Toolbar